American Cancer Society How To:
EMC Guide

EVENT MANAGEMENT CENTER GUIDE

Welcome to the American Cancer Society's Comprehensive Website Management Guide.
This Guide is broken out into two main parts – the Participant Experience (signing up and using the dashboard) and the Event Manager Experience (working within the different functions of the EMC).

Let's dive in! ☺

Last Updated: December 2015

Please note: Some of the content and screen shots may reference 'Relay For Life' specifically, however the functionality applies to all event types.

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Chapter 1: Register Online

- Society Account
    - Creating a New Account
    - Logging in to Your Existing Society Account
- Start a Relay Online Team - Team Captains
- Join a Relay Online Team - Team Members
- Register as a Survivor / Walk the Survivor Lap

Society Account

The American Cancer Society account login process has been upgraded to a new enhanced single sign-on. This update ensures proper security and a consistent experience across all American Cancer Society applications.

The main benefits are –

- Now you can login using your preferred social account login credentials or with your email address
- You will be recognized on all of our event sites, so there will be no need for multiple user names and passwords
- Enhanced account security across all Society applications

Creating a New Account

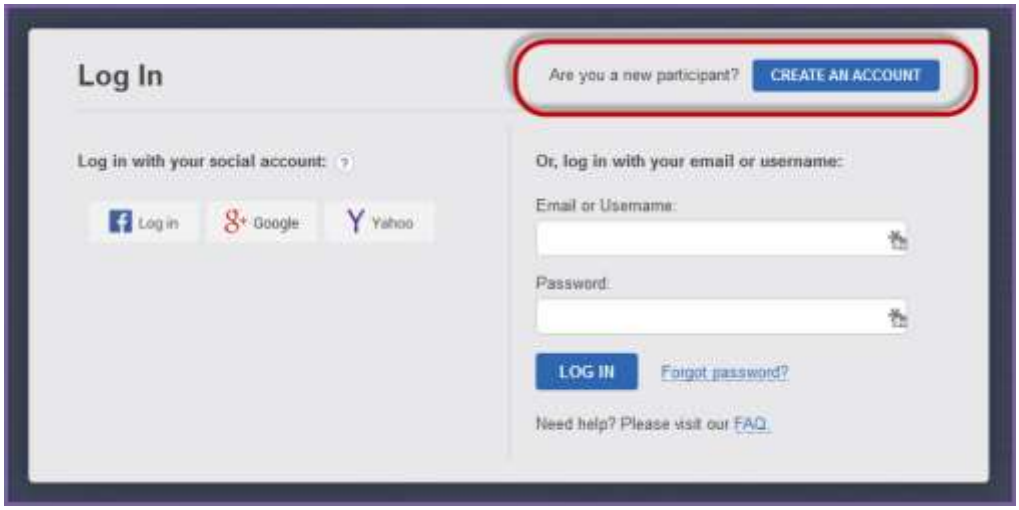
(For first-time American Cancer Society online event participants)

If you have never participated in an American Cancer Society event online (this includes Relay For Life, Making Strides Against Breast Cancer, Bark For Life, DetermiNation, etc.) you can create a brand new Society Account which you can use for any future ACS online activity!

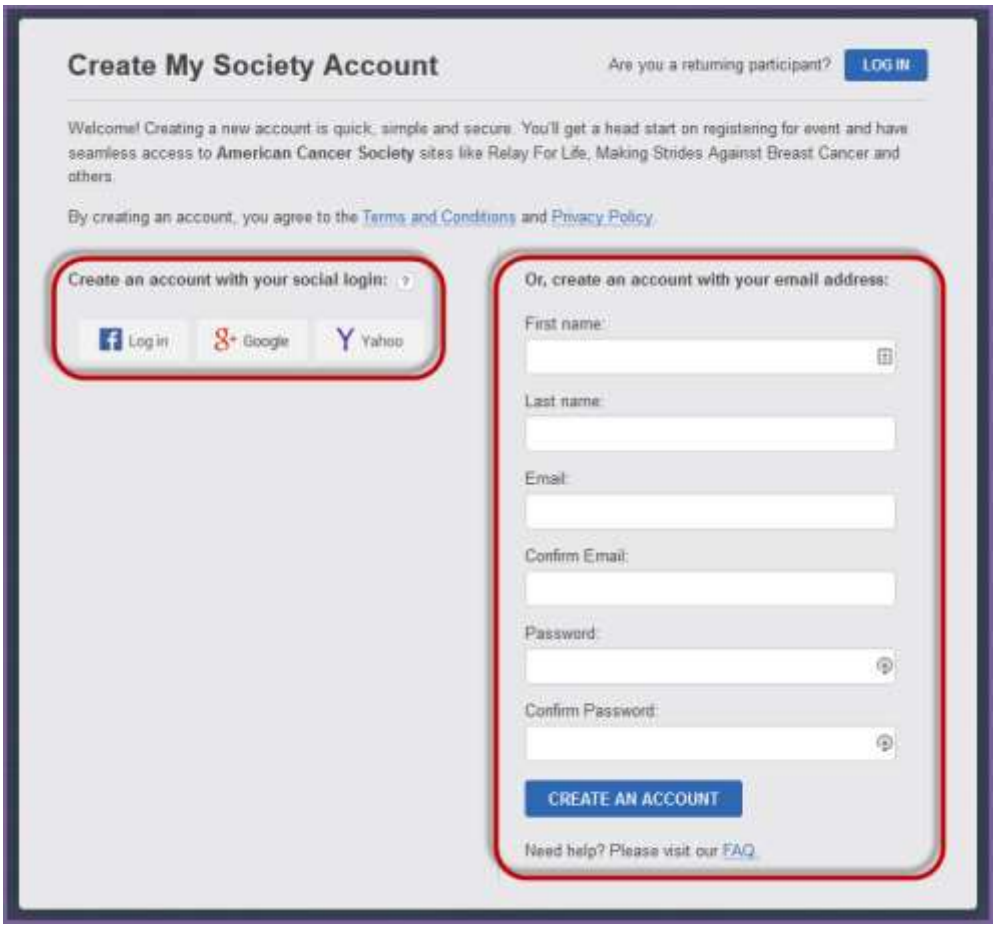
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Click on the **Log In** link in the upper right-hand corner.

3. To begin the process of creating your new Society account, click the blue **Create an Account** button.



4. You can choose to create your new account using our social login feature OR using your email address.
    a. ***Note:*** *If you choose to create an account with your email address, it must be a unique email address, not used by another other ACS online event participant. Enter the required information, and* ***click Create an Account****.*
    b. If you need additional assistance creating your new Society Account, feel free to call our web site support desk at 877-957-7848. We're always ready to assist you with any question you might have.



Note: *See Chapter 3 for information on managing your Society Account.*

Logging in to Your Existing Society Account

(For returning American Cancer Society online event participants)

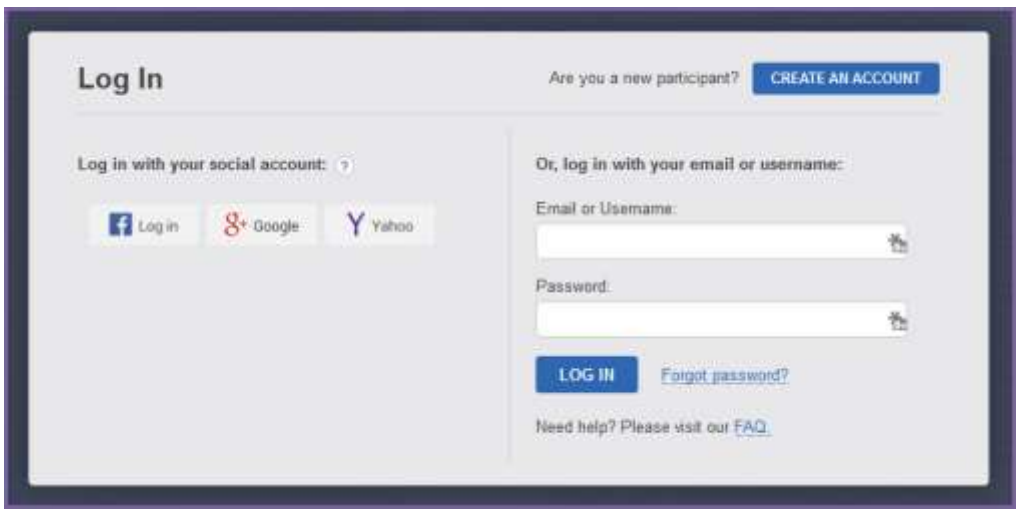
If you have previously participated in an American Cancer Society event online (this includes Relay For Life, Making Strides Against Breast Cancer, Bark For Life, DetermiNation, etc.) you can login using the most recent email address with which you registered.

After this upgrade, you won't have to remember multiple email addresses if you participate in a variety of American Cancer Society events. Once you've updated your account and created a new password, you'll be able to access any of our event or program websites using your newly created American Cancer Society account login information.

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Click on the **Log In** link in the upper right-hand corner.

3. Use one of the Log In options to access your account.
    a. If you were already registered before November 19, 2014, you will be unable to log into your event site until you upgrade to a new Society Account. (Don't worry, your dashboard will still function and receive donations in the meantime.)
    b. If you need additional assistance creating your new Society Account, feel free to call our web site support desk at 877-957-7848. We're always ready to assist you with any question you might have.



Start a Relay Online Team – Team Captains

Thank you for being a Relay For Life team captain.

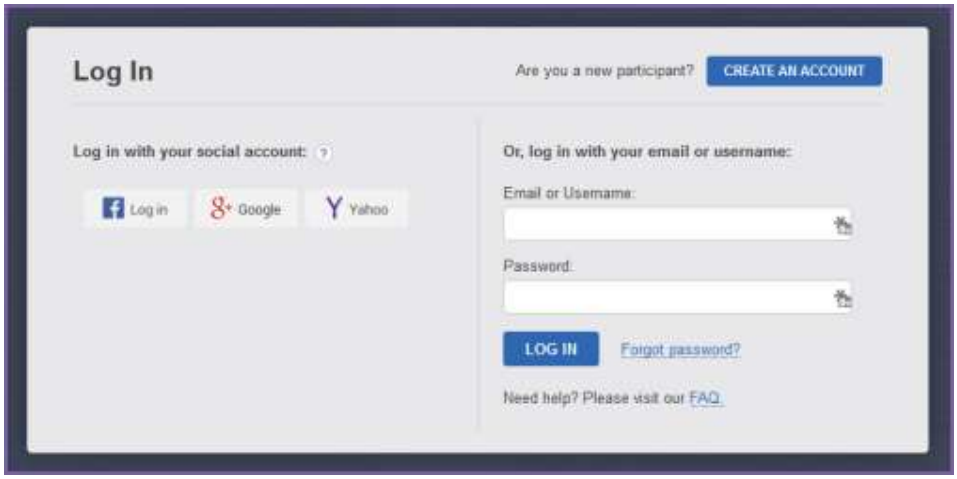
As a team captain, you may begin your team building and fundraising as soon as you set up your team's webpage. Team captains serve as role models for online fundraising and help build excitement for the event. Please use these step-by-step instructions to register your team online.

Good luck and have fun!

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

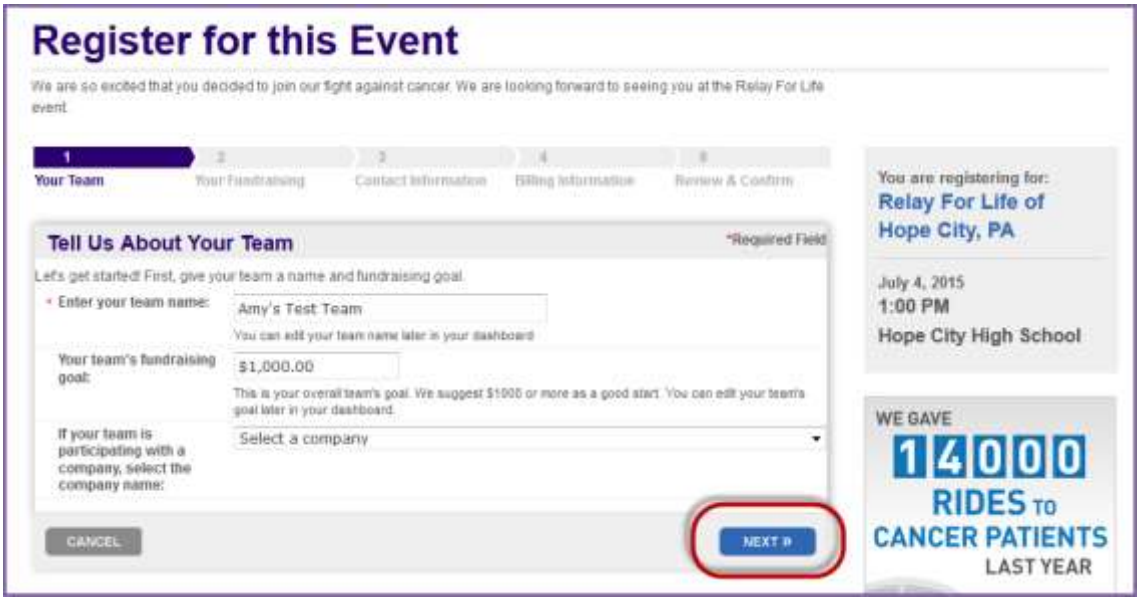
2. Click on the **Sign Up** link.

3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)
    a. ***Note:*** *If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with the registration process.*

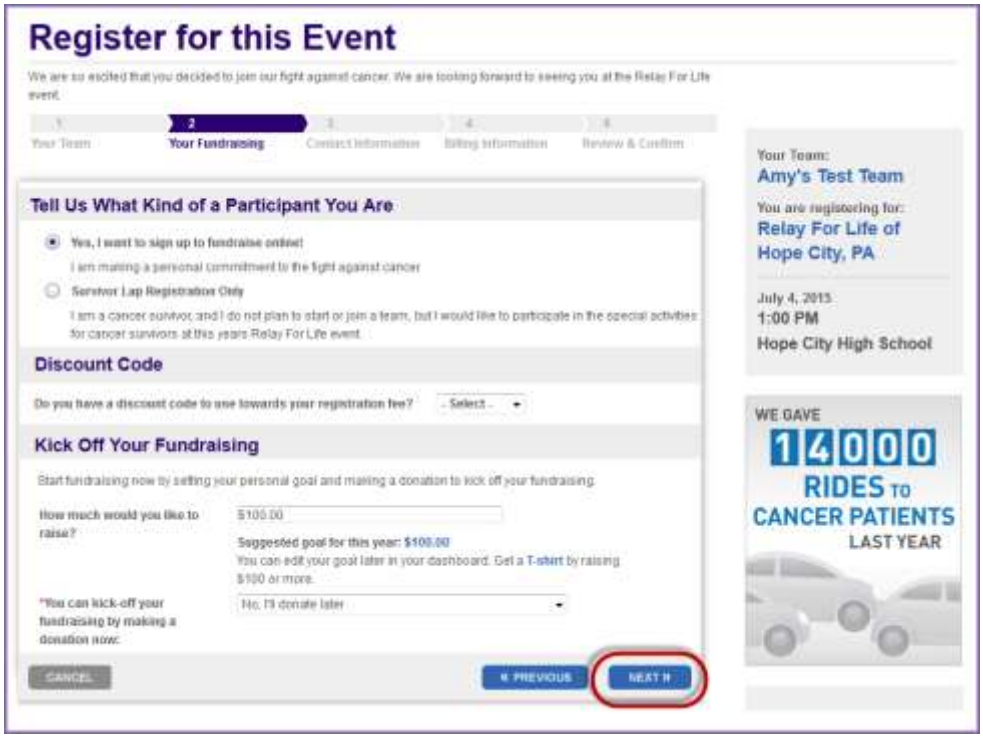


4. Once you have logged into the website, click the **Start a Team** button.

5. Enter information about the team you are creating before clicking **Next**:
   - **Name your team**
   - **Select your team fundraising goal ($)**
   - **Select if your team is affiliate with a company or organization**



6. Select the **participation option** that best fits your involvement in Relay For Life by clicking the radio button beside the participation type name and description.



7. If you have a discount code to apply to your registration fee, select **YES** from the drop down menu beside the question "**Do you have a discount code to use towards your registration fee?**" Enter the code in the field that appears.

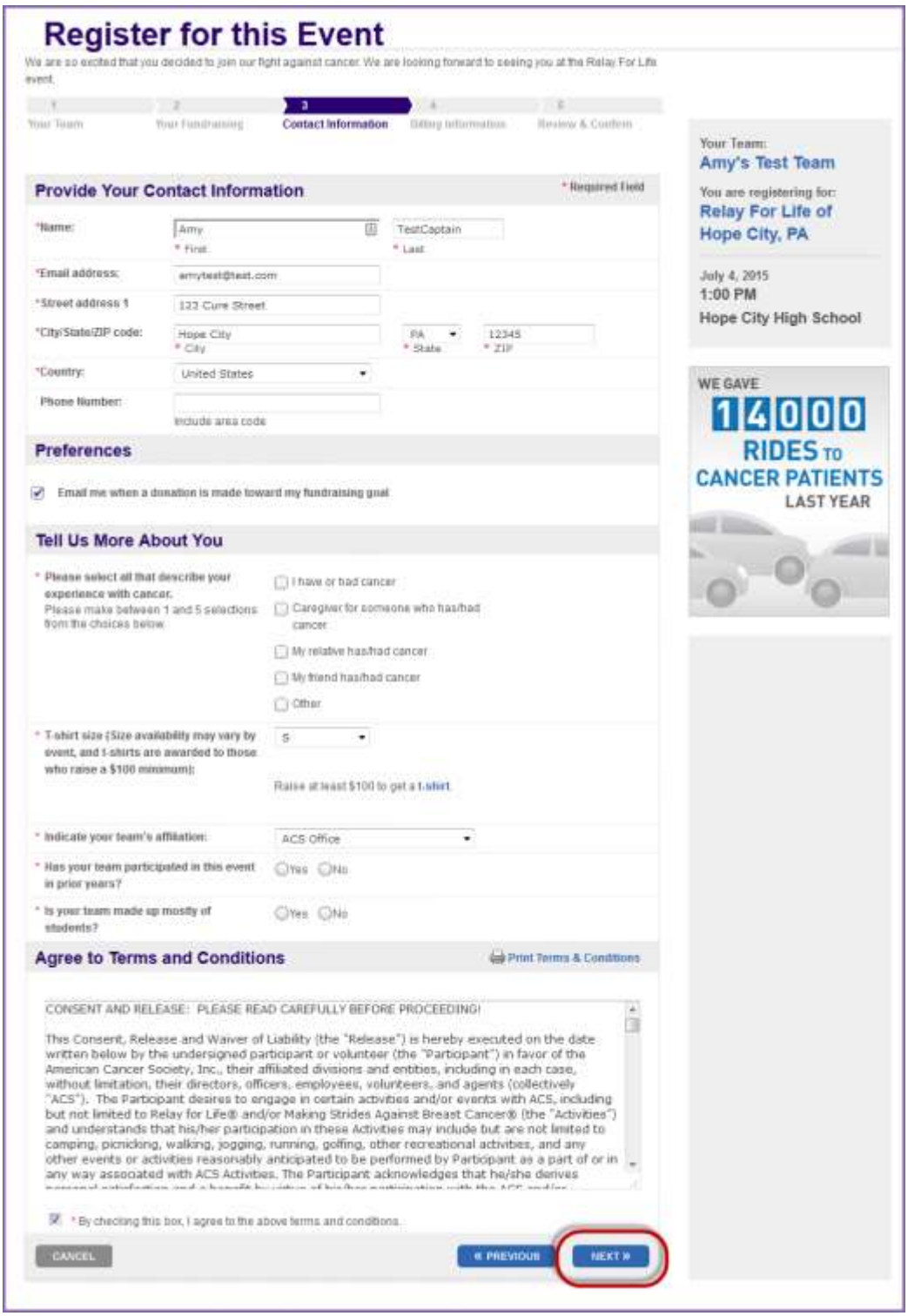
8. Personalize your individual **Fundraising Goal**.

9. If you would like to make a donation to kick start your fundraising, select **YES** from the **"You can kick-off your fundraising by making a donation now"** drop down. Once you confirm to make a donation during the registration process, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select **No I'll donate later**.

a. If you choose to start off your fundraising by making a donation during your registration, determine if you would like to make the gift anonymous by checking the appropriate box.

10. Click **Next**.

11. Complete the **Registration Form** with your personal information. Remember the * symbol means the field is required.



If you are a returning participant, this information should be completed for you, making the registration process easier. Please be sure to check that all fields are updated for the current year.

a. **Contact information**
b. **Email preferences**
c. Answer the **additional registration questions** regarding your relationship with cancer, t-shirt size, and team information.

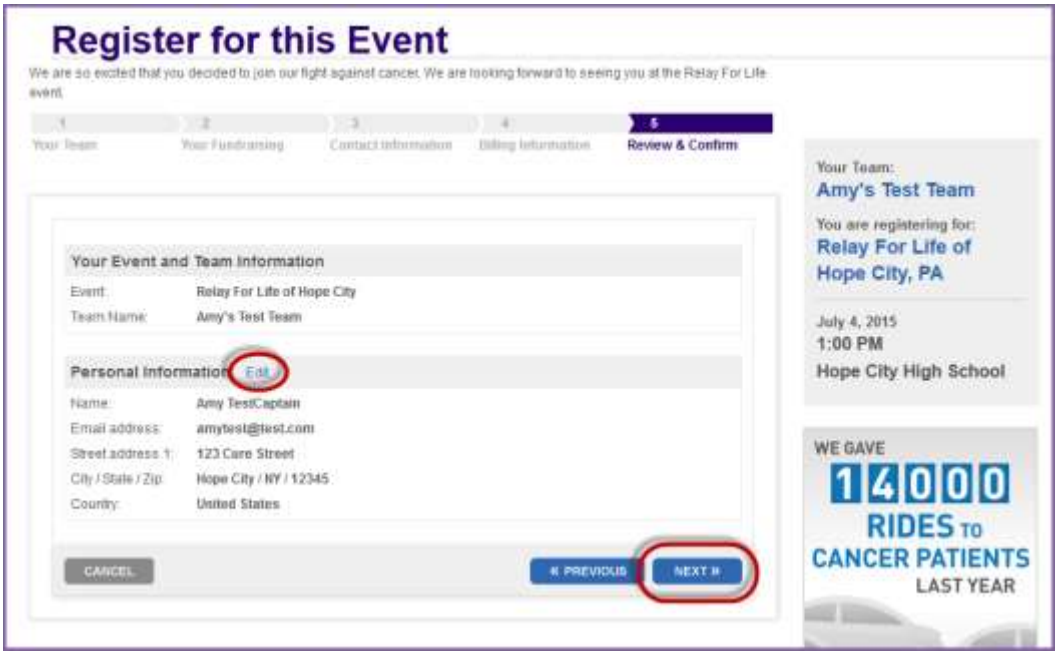
12. Read the Waiver and click the box beside "**I agree to the terms and conditions**" before clicking **Next**.

New for Relay!

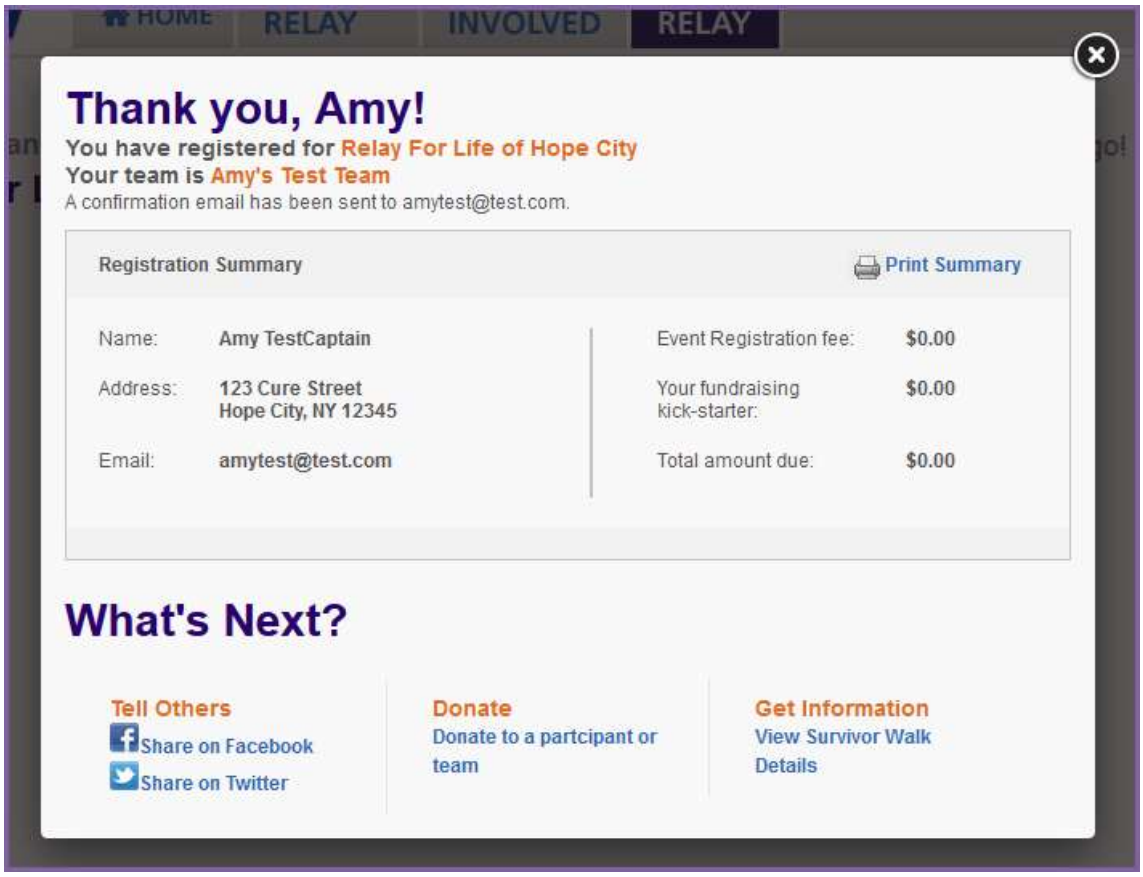
There are far fewer questions being asked during the registration process this year.

Waiver appears on the same screen, so the entire registration process is all in one step!

13. Review the contact and registration information you provided before clicking **Next** to complete the registration process.
    a. If your information is not correct, click the **Edit** button to make the necessary changes.



14. **Your Relay registration is complete!** After completing the registration process, you will receive a confirmation message and access to the Relay Dashboard where you may start building support to fight cancer.



Join a Relay Online Team – Team Members

Thank you for being a Relay For Life team member. Please use these step-by-step instructions to join your team online.

By signing up online, you have access to a number of tools, such as a personal webpage to share your story, a message center to send out emails to your friends and family asking for their support, and an easy way to track your progress.

Good luck and have fun!

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

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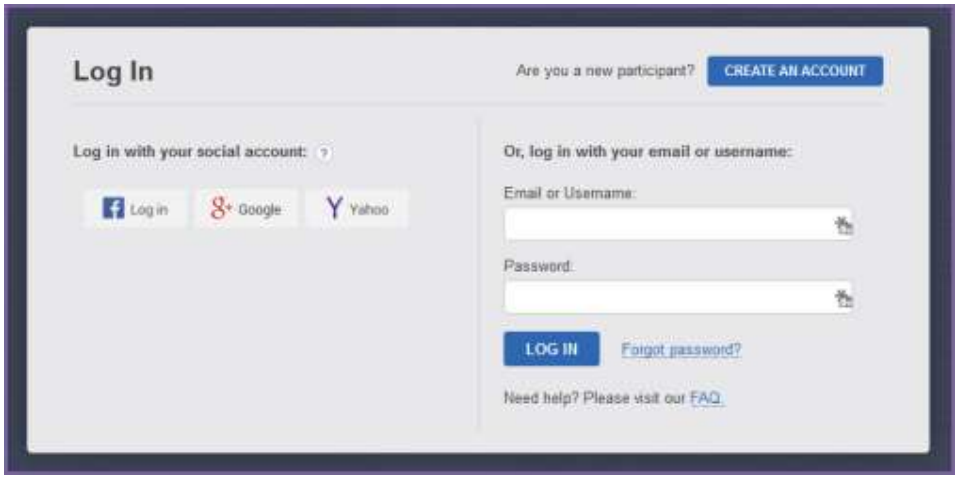
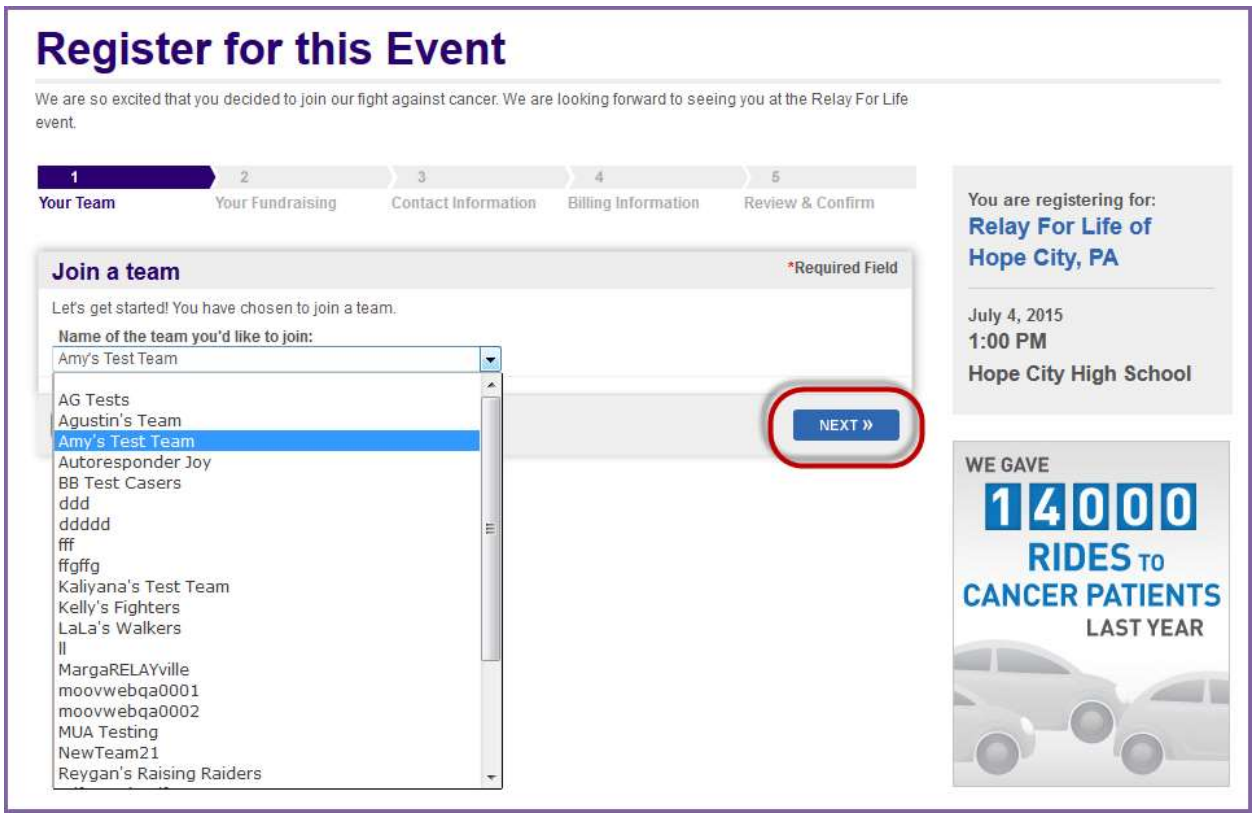


4. Once you have logged into the website, click the **Join a Team** button.

5. To find the team you wish to join, click the drop down menu arrow. All the teams that have registered on the website will appear in a list. Select your team. Click **Next**.



6. Select the **participation option** that best fits your involvement in Relay For Life by clicking the radio button beside the participation type name and description.

7. If you have a discount code to apply to your registration fee, select **YES** from the drop down menu beside the question "**Do you have a discount code to use towards your registration fee?**" Enter the code in the field that appears.

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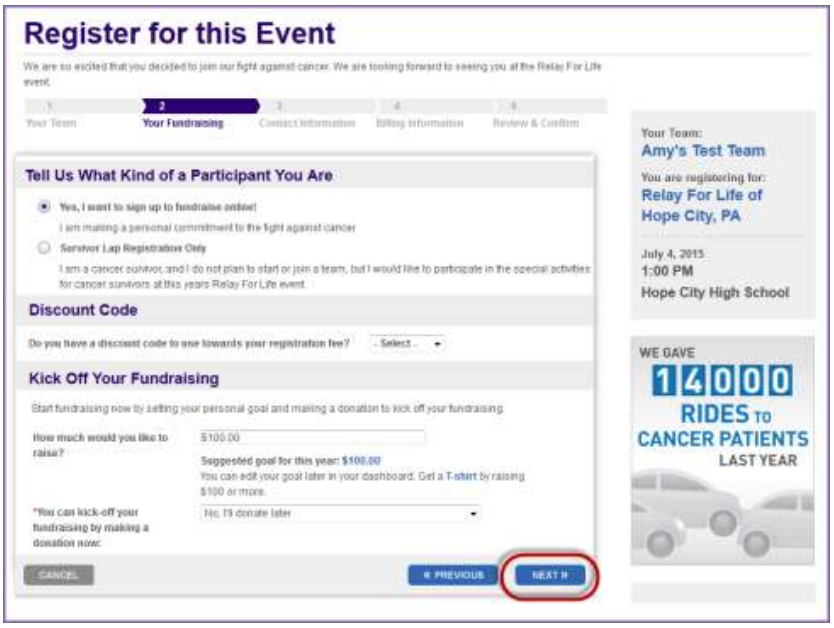
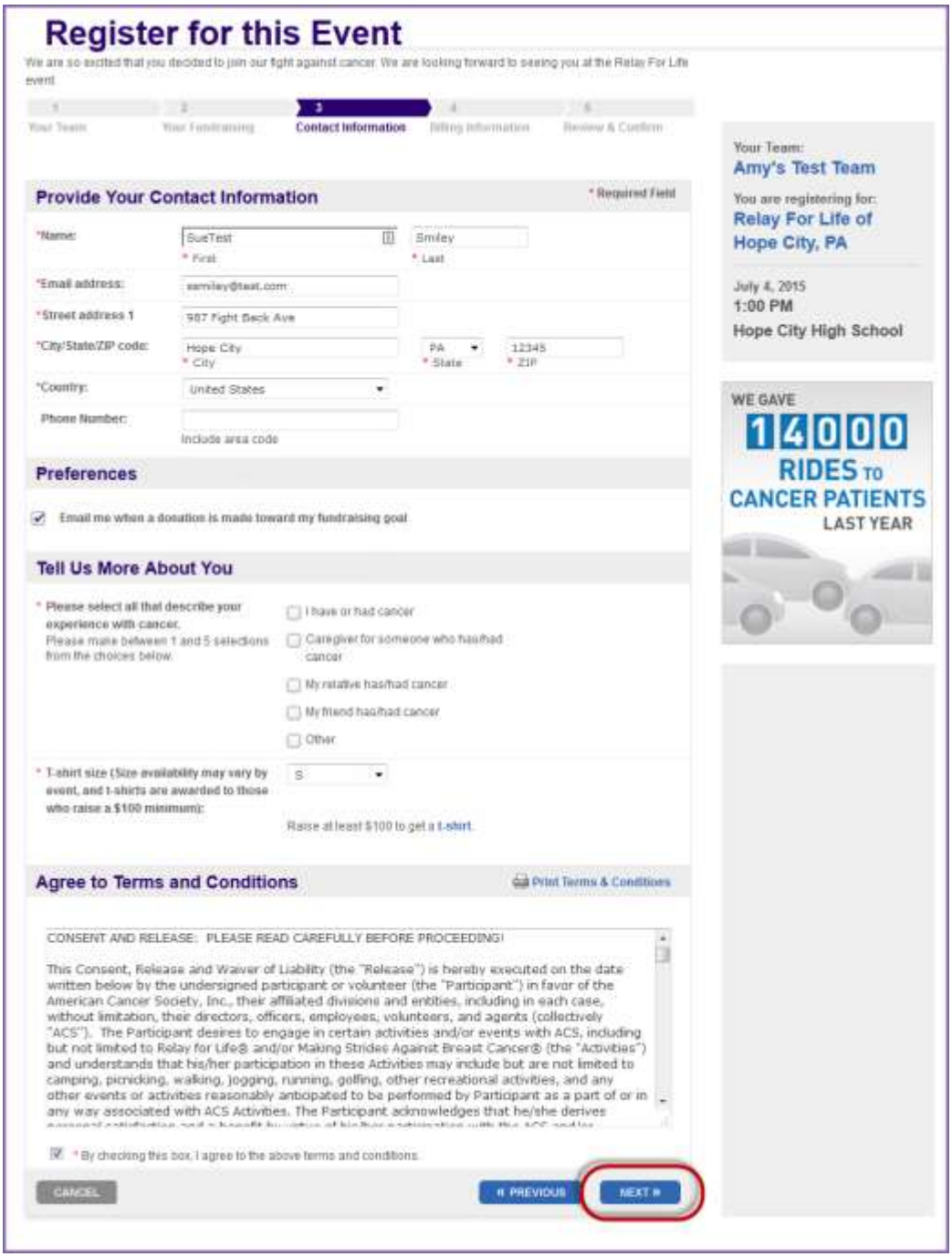


9. If you would like to make a donation to kick start your fundraising, select **YES** from the **"You can kick-off your fundraising by making a donation now"** drop down. Once you confirm to make a donation during the registration process, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select **No I'll donate later**.

a. If you choose to start off your fundraising by making a donation during your registration, determine if you would like to make the gift anonymous by checking the appropriate box.

10. Click **Next**.

11. Complete the **Registration Form** with your personal information. Remember the * symbol means the field is required.



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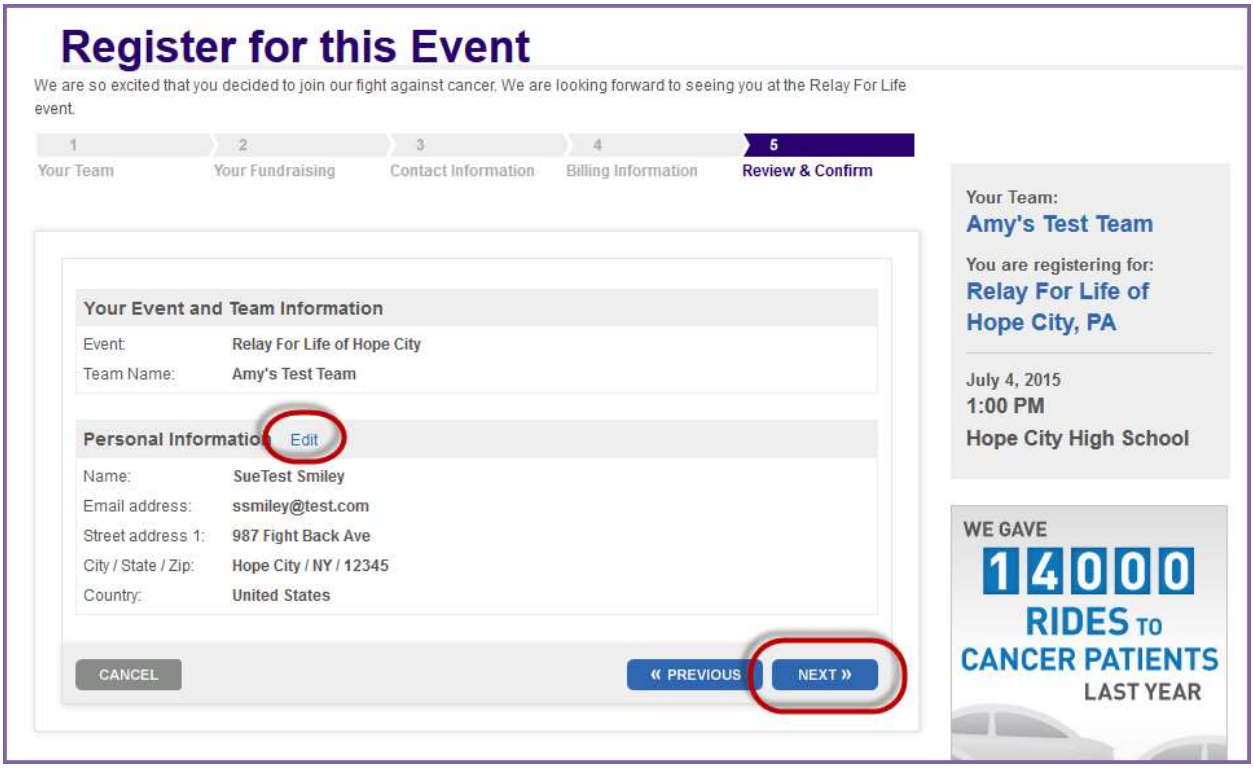

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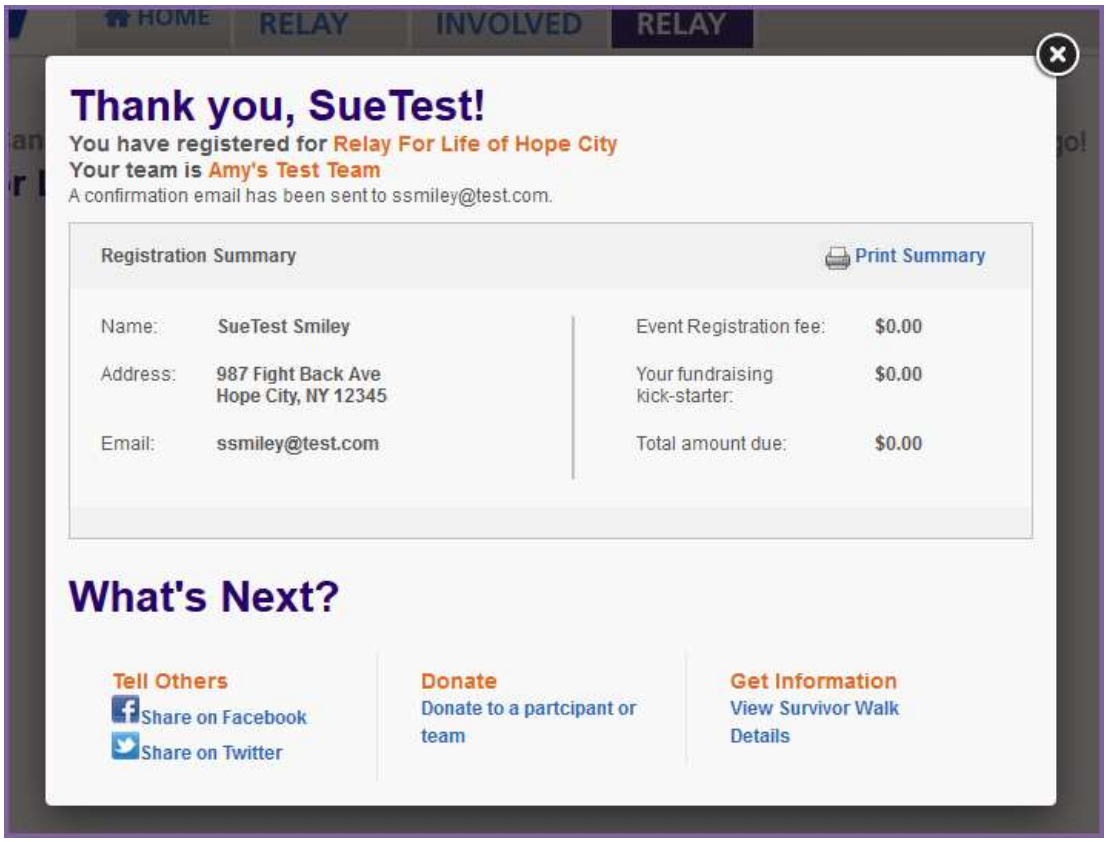

Register as a Survivor / Walk the Survivor Lap

Thank you for joining Relay For Life as a cancer survivor.

As a cancer survivor, you may join a Relay event as **a team captain, a team member,** or as **an individual participant who only wishes to walk in the survivor lap.** Your online registration should reflect how you wish to participate in Relay For Life in addition to your history with cancer.

Please use the following instructions to help you register online for your Relay event's **survivor lap only**. *If you are a team captain or team member, please use the instructions to start or join a team to guide your online registration.*

Good luck and have fun!

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Click on the **Sign Up** link.

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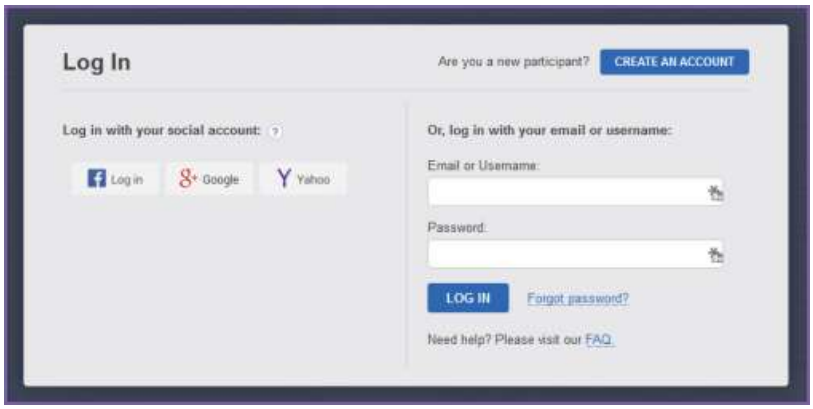

4. Once you have logged into the website, click the **Walk the Survivor Lap** button.

5. If you did not previously register online for Relay For Life, click the **Walk the Survivor Lap** button.

6. Select the **participation option** that best fits your involvement in Relay For Life by clicking the radio button beside the participation type name and description.
    a. As a walker in the Survivor Lap, you may select the **"Survivor Lap Registration Only"** option.

7. Personalize your individual **Fundraising Goal**.

8. If you would like to make a donation to kick start your fundraising, select **YES** from the **"You can kick-off your fundraising by making a donation now"** drop down. Once you confirm to make a donation during the registration process, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select **No I'll donate later**.
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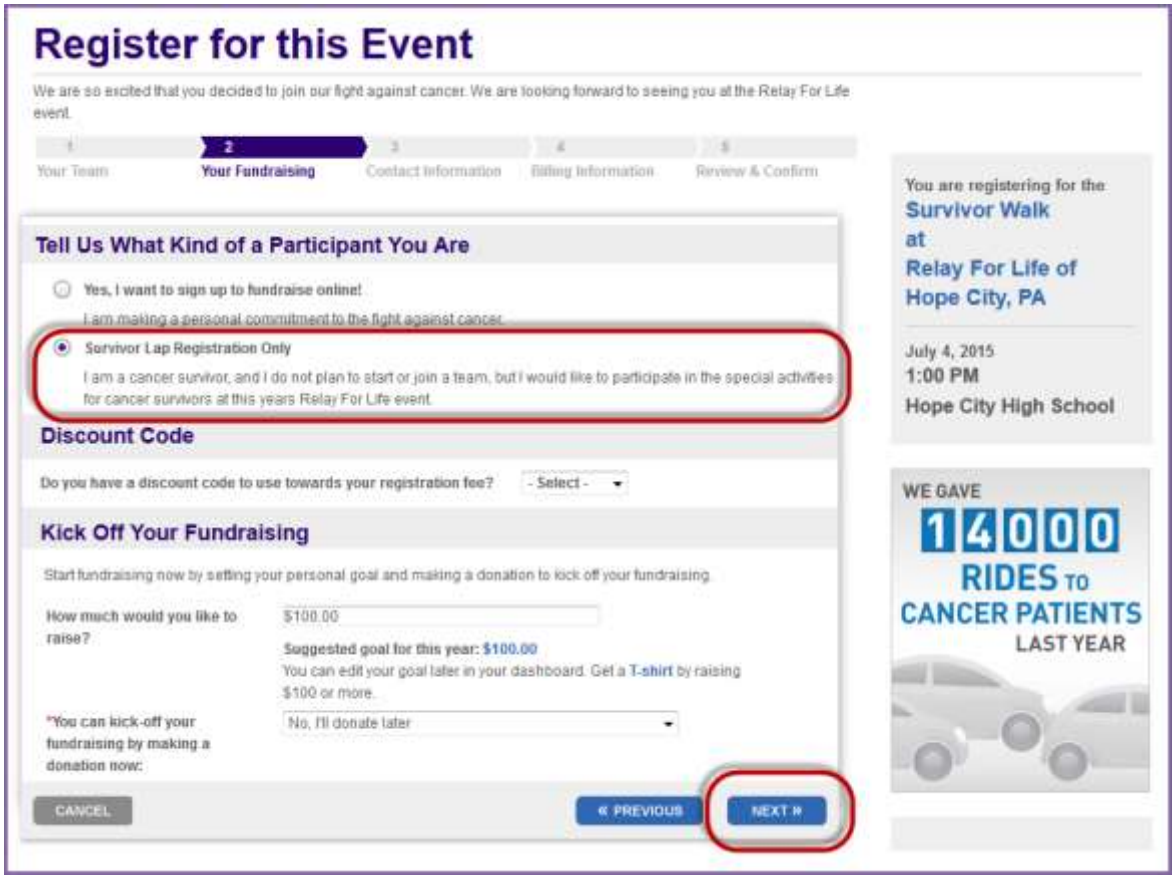

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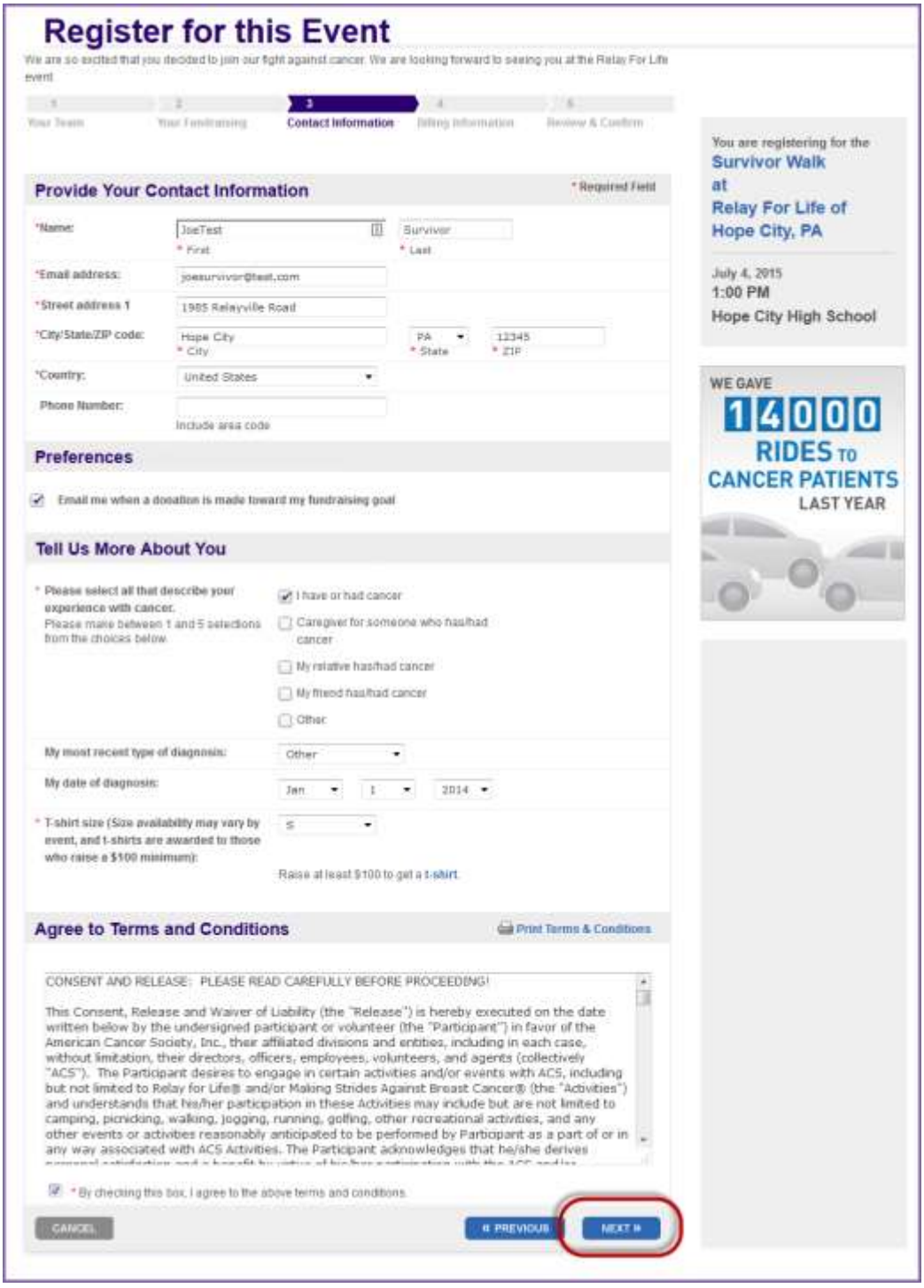

If you are a returning participant, this information should be completed for you, making the registration process easier. Please be sure to check that all fields are updated for the current year.

a. **Contact information**
b. **Email preferences**
c. Answer the **additional registration questions** regarding your relationship with cancer and t-shirt size.

11. Read the Waiver and click the box beside "**I agree with the terms and conditions stated above**" above before clicking **Next**.

New for Relay!

There are far fewer questions being asked during the registration process this year.

Waiver appears on the same screen, so the entire registration process is all in one step!

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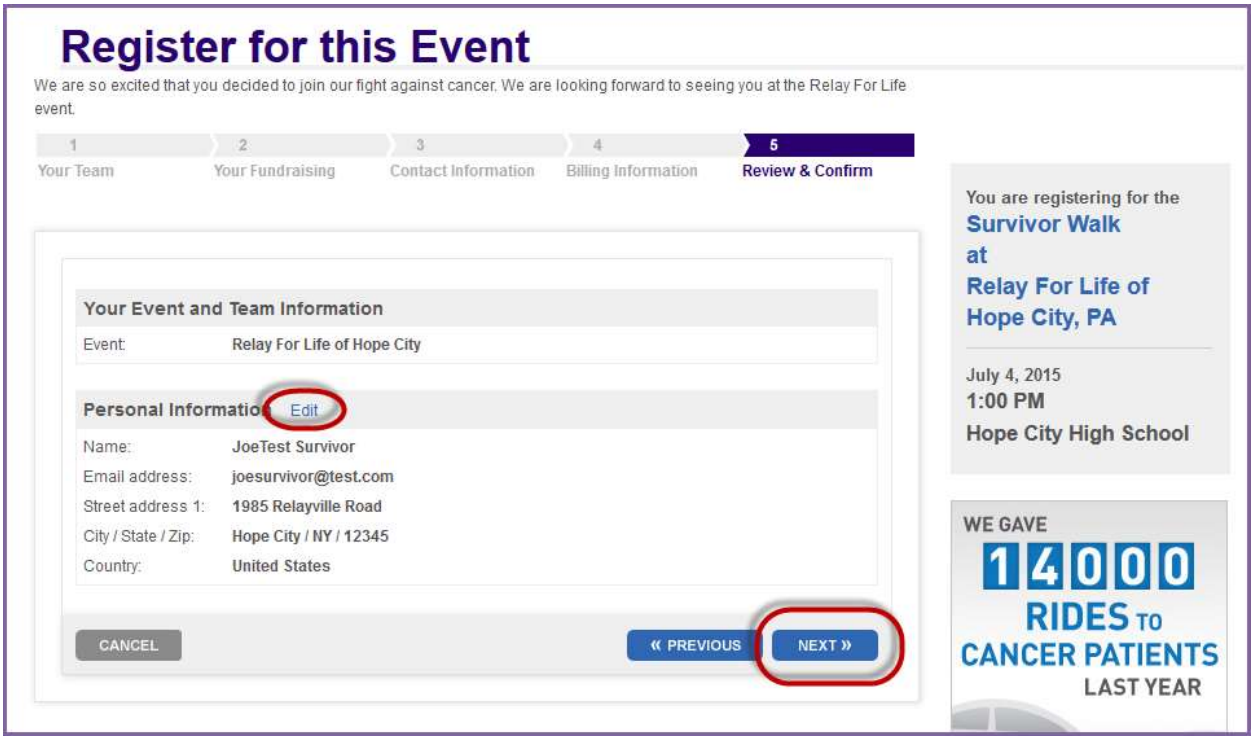

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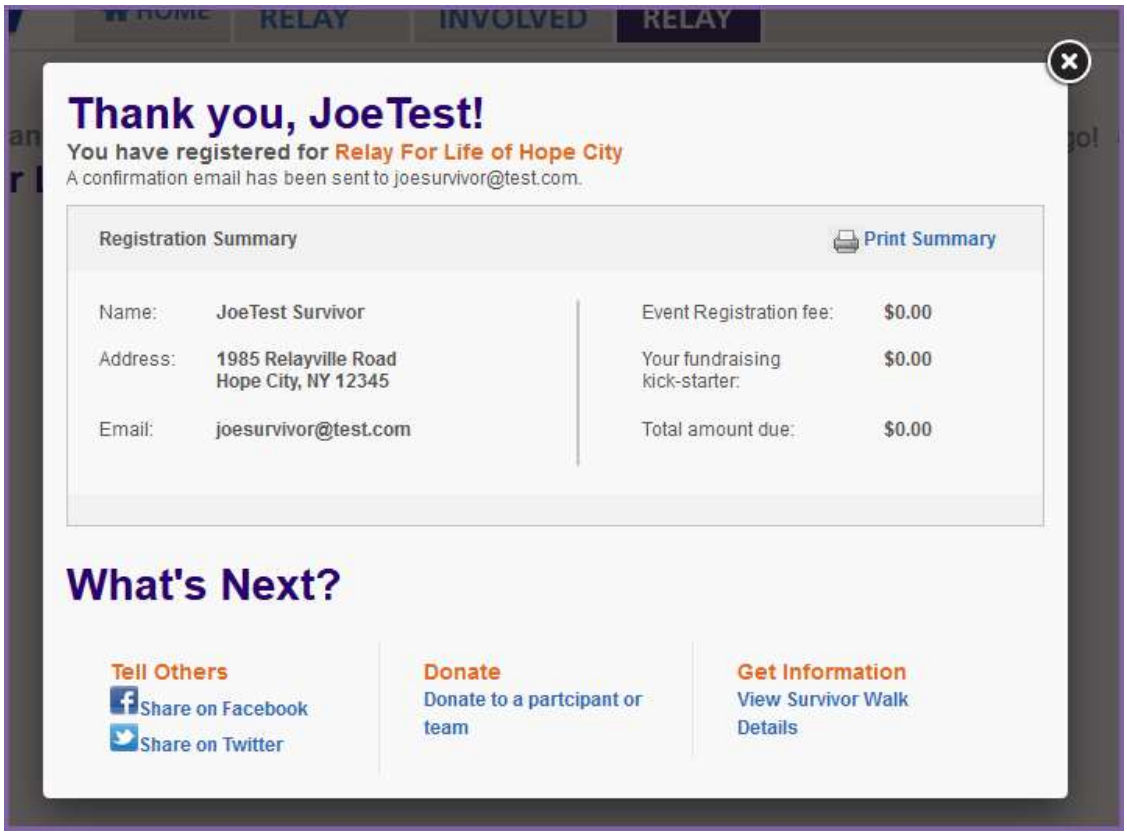


Chapter 2: Online Fundraising Tools – Your Relay Dashboard

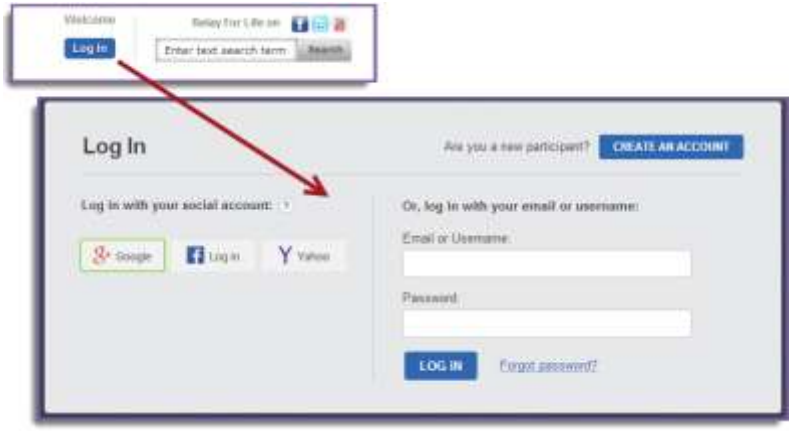
- Access Your Relay Dashboard
- Dashboard Overview
    - My Relay Tab
    - My Team Tab
    - My Event Tab

As an online Relay participant, you have a number of tools available to make your fundraising and team building experience easy and fun. The Relay Dashboard provides you with resources to share your story, ask for support from your family and friends, and track your team and event progress.

This section of the manual will provide you with instructions on how to access the Relay Dashboard as well as give you an overview of the tools available in each area.

Enjoy these tools and have fun!

Access Your Relay Dashboard



1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

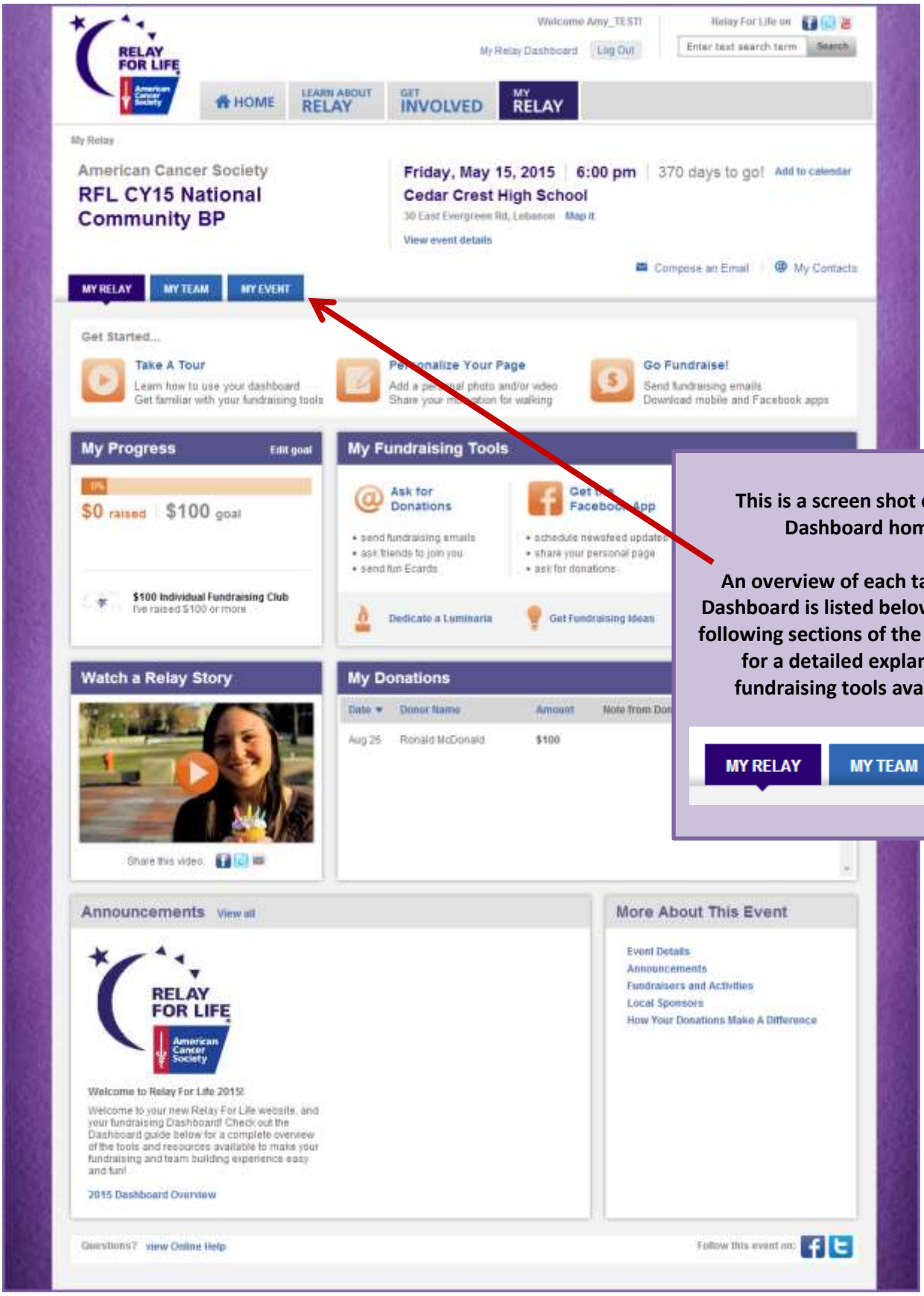
2. Enter your Username and Password in the login fields in the top right corner. Follow the prompts to login or create a new account.

3. Forgot your login? No problem! You can also have your password e-mailed to you by clicking the **Forgot Username/Password** link in the login box. Simply enter your email address to have it sent to you!

Note: *If this is your first time logging in since November 2014, you may also need to migrate your participation record to the new Society Account. Lean more about the new Society Account in Chapter 1.*

4. Once logged in, the Relay For Life website will transform into the personal Relay Dashboard. From your Relay Dashboard you can access many tools to make your Relay For Life fundraising and team building experience easy while continuing to get information about the event

CONGRATULATIONS! You are now logged in to Your Relay Dashboard.



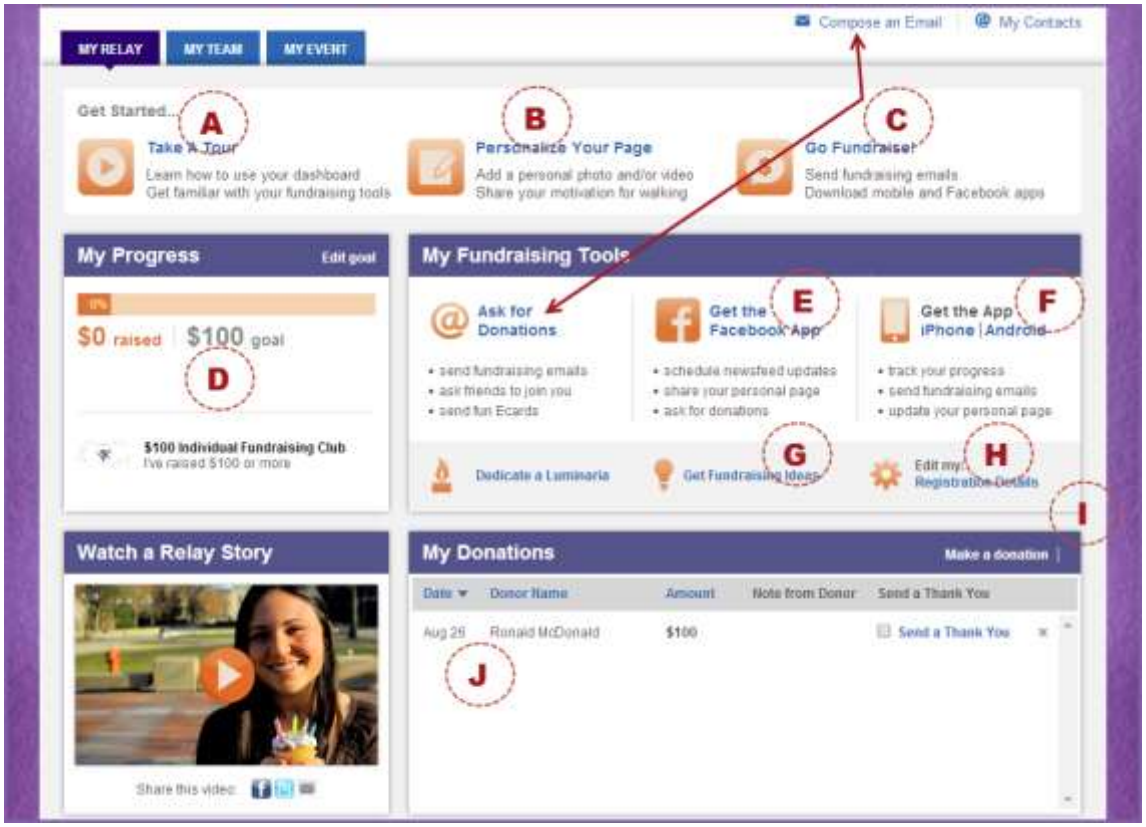
This is a screen shot of your Relay Dashboard homepage!

An overview of each tab of the Relay Dashboard is listed below. Please see the following sections of the dashboard guide for a detailed explanation of the fundraising tools available to you.

MY RELAY **MY TEAM** **MY EVENT**

Dashboard Overview

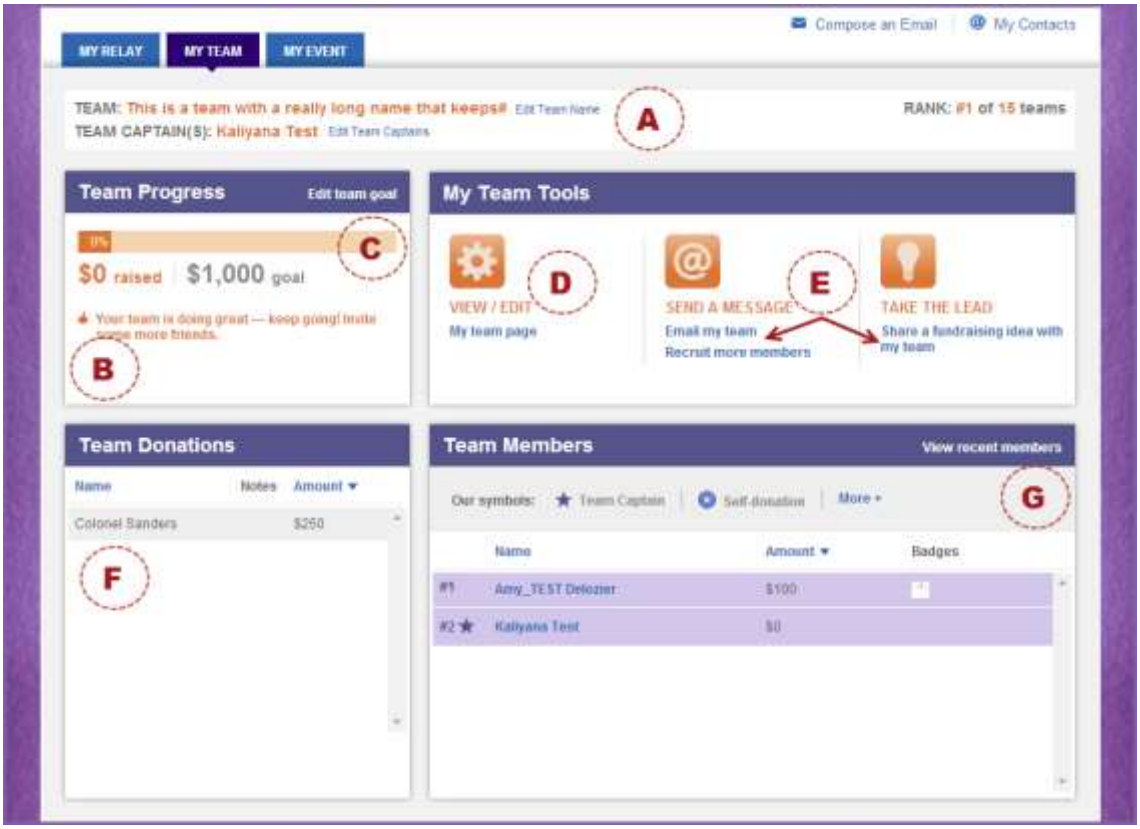
1. **My Relay Tab** - from the My Relay tab you can perform the following functions:
   A. Tour the tools available in the Relay Dashboard
   B. View and edit your personal page
   C. Send an email to your family and friends, asking for their support
   D. View and edit your fundraising efforts towards your goal
   E. Use Facebook to extend your request for support to your social media friends
   F. Get the mobile Relay For Life app
   G. Get fundraising ideas
   H. Update your registration answers
   I. Donate to yourself
   J. View your online donation history and send Thank Yous



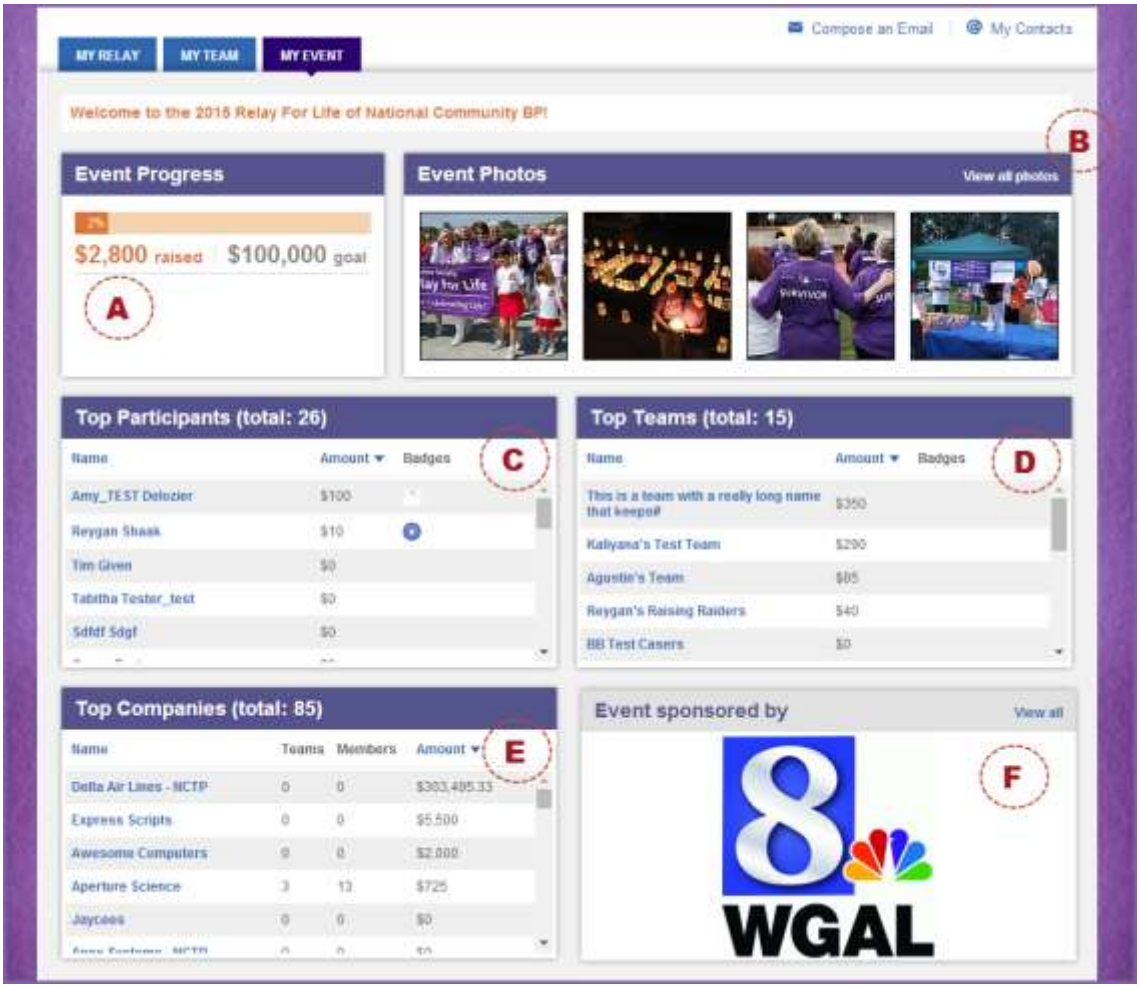
K. Stay up to date with the latest event announcements
L. Access event information

2. **My Team Tab** - from the My Team tab you can perform the following functions:

A. Update the team name/team captains (Team Captain only)
B. View your team fundraising efforts towards the collective goal
C. Edit the team fundraising goal (Team Captain Only)
D. View the team page / Edit the team page (Edit function available to Team Captain only)
E. Send messages inviting friends, family and coworkers to join your team, or send fundraising tips to your team members
F. View your team's recent online donation history
G. See a roster of your teammates, including amount raised



3. **My Event Tab** - from the My Event tab of the Relay Dashboard, you can keep up to date with how your Relay For Life is building towards a great event:
    A. View your event fundraising efforts towards the collective goal
    B. See event photos from a Flickr stream
    C. View a list of all participants online
    D. View a list of all team registered online
    E. View a list of all companies registered online
    F. See details on top event sponsors



Chapter 3: Managing Your Online Information

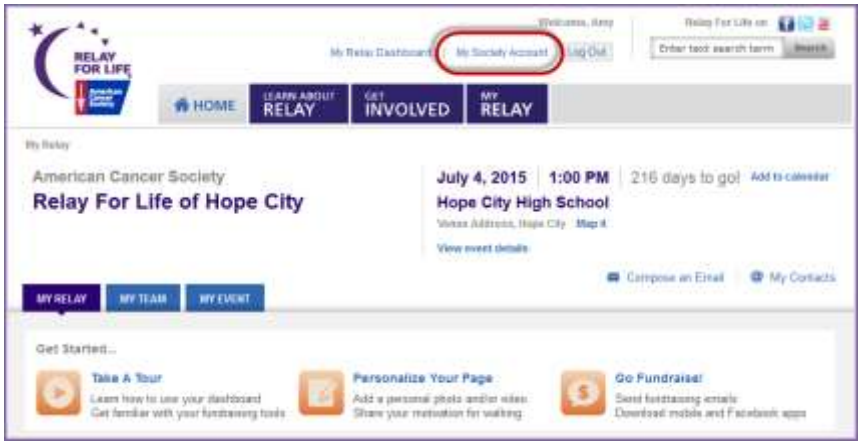
- Update Your Relay For Life Online Profile
- Update Your Login Preferences
- Update Your Email Preferences
- Trouble accessing your Relay Dashboard? Try these steps.

After you register online to participate in Relay For Life, you can manage and update your profile – including your name, contact information, username/password, and email preferences.

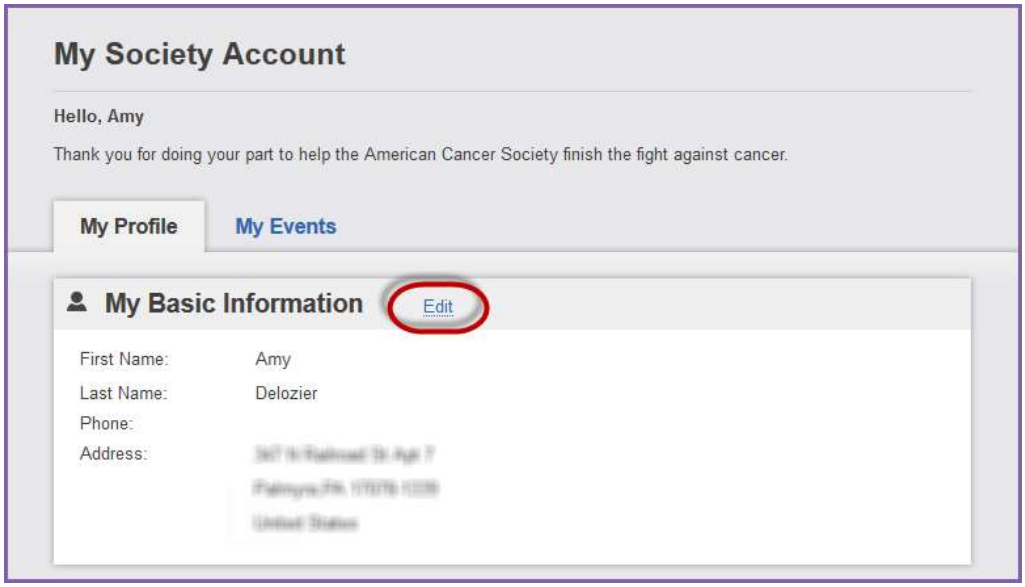
Update Your Relay For Life Online Profile

1. Using your username and password, log into your **Society Account** (see Chapter 1 for more information on your Society Account)**.** You will be automatically taken to your Relay Dashboard.

2. In the upper right-hand corner of the screen, click on the **My Society Account** link next to your name.



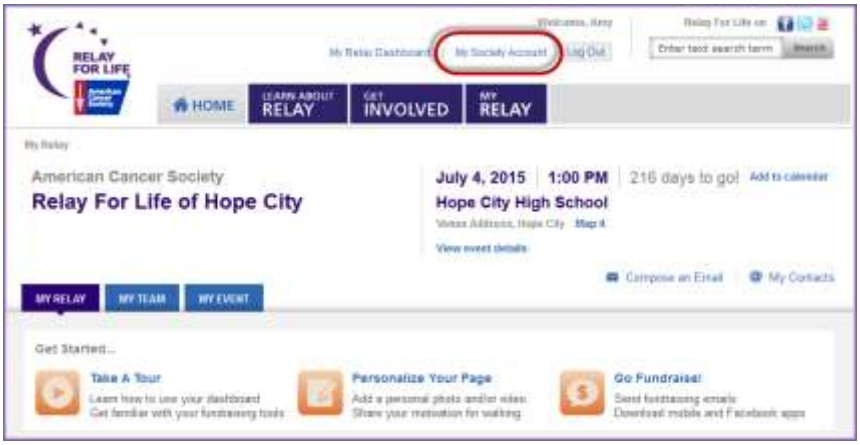
3. Click the blue **Edit** link to make changes to your biographical and contact information. Click **Update** to save your changes.



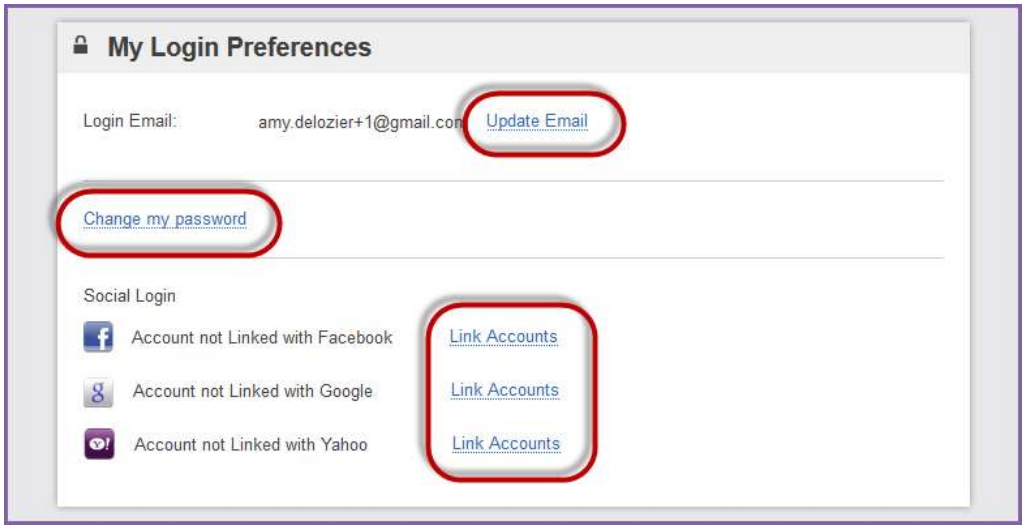
Update Your Login Preferences

1. Using your username and password, log into your **Society Account** (see Chapter 1 for more information on your Society Account)**.** You will be automatically taken to your Relay Dashboard.

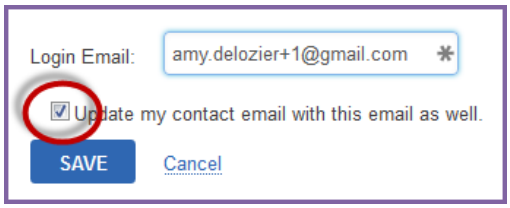
2. In the upper right-hand corner of the screen, click on the **My Society Account** link next to your name.



3. Scroll down to the **Login Preferences** section.



4. Click the appropriate blue links to make changes to your login email and/or password. Make sure you always click **Save / Update** once you've made the desired changes.
    a. ***Note:*** *If you want to simultaneously update your contact email, so you also receive emails at your new email address, check the box before saving.*

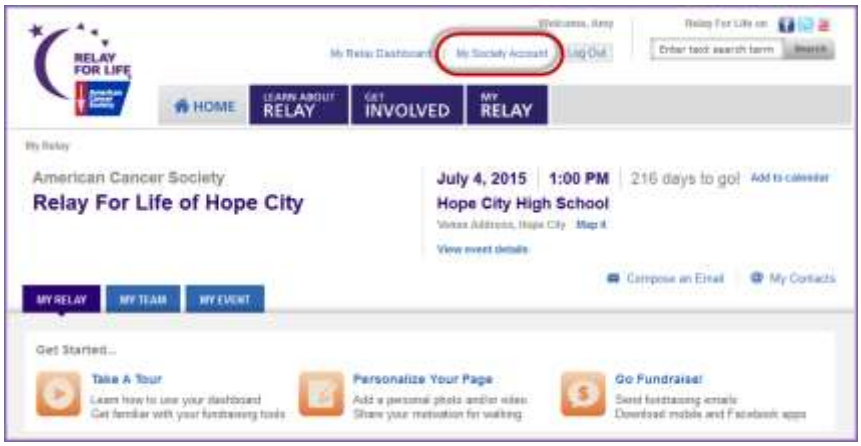


5. You can also choose to link your Society Account to your Facebook, Google or Yahoo login, which will allow for easier login in the future.

Update your Email Preferences

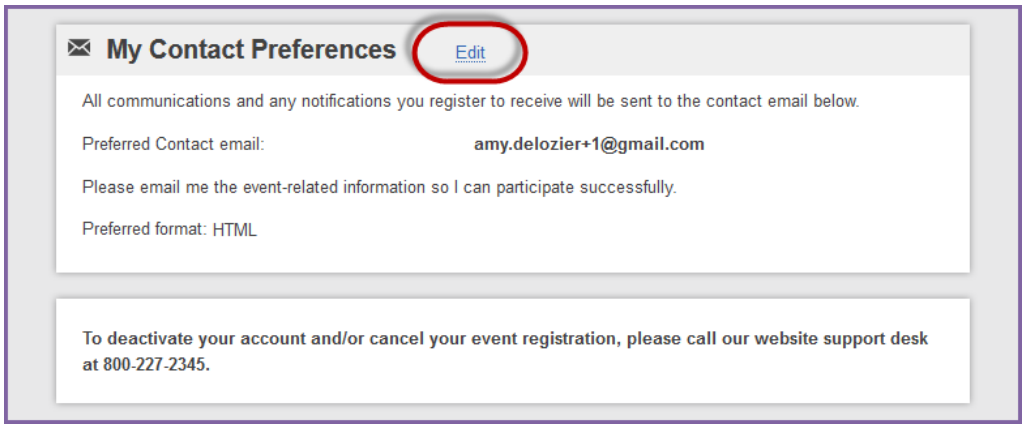
1. Using your username and password, log into your **Society Account** (see Chapter 1 for more information on your Society Account)**.** You will be automatically taken to your Relay Dashboard.

2. In the upper right-hand corner of the screen, click on the **My Society Account** link next to your name.



3. Scroll down to the **My Contact Preferences** section.

4. Click the blue **Edit** link to make changes to your contact preferences. Click **Update** to save your changes.
    a. You can change your contact email address
    b. Opt in/out of receiving emails
    c. Select HTML or Plain Text as your preferred email format. HTML is recommended, as that allows you to get the full Relay For Life experience from each email, with photos and links.



Trouble accessing your Relay Dashboard? Try these steps.

Clear your Browser's Cache
Most browsers have what we call "caching issues," which basically means your computer is remembering something you don't want it to. This is common when you frequently use the back button on a site, and can also happen to if you're using a shared computer. To clear your cache, follow the instructions below based on which browser you're using:

FireFox:

- Go to 'Tools'
- Click 'Options'
- Go to the 'Privacy' tab
- In the center of the page, click the 'Clear your recent history' link
- Go to the 'Advanced' tab, and click on "Network"
- Under "Offline Storage", click 'Clear now"
- Click OK.

Internet Explorer:

- Go to 'Tools'
- Click 'Internet Options'
- In the General tab, click "Delete" under the 'Browsing history' section
- Check all desired options, then click 'Delete'
- Click OK.

Google Chrome:

- From the menu, select 'Tools'
- Select Clear browsing data
- In the dialog that appears, select the checkboxes for the types of information that you want to remove
- Use the menu at the top to select the amount of data that you want to delete. Select beginning of time to delete everything
- Click Clear browsing data

Please note that clearing your cache may take several minutes, during which time your computer may appear to freeze or the browser may appear to stop responding/lock up. Please be patient and allow this process to finish. If you continue to experience problems after clearing your cache, completely quit the browser (close all open windows, regardless of what site is open in that window), then reopen the browser. This will clear session data, which can also cause caching issues.

Note: *If this is your first time logging in since November 2014, you may also need to migrate your participation record to the new Society Account. Lean more about the new Society Account in Chapter 1. If you need additional assistance creating or accessing your new Society Account, feel free to call our web site support desk at 877-957-7848. We're always ready to assist you with any question you might have.*

Chapter 4: Managing Your Personal Relay Website

- Update your fundraising goal
- Customize your Personal Page
    - Edit your Personal Page
    - Upload a photo or video to your Personal Page
- Create a personal URL

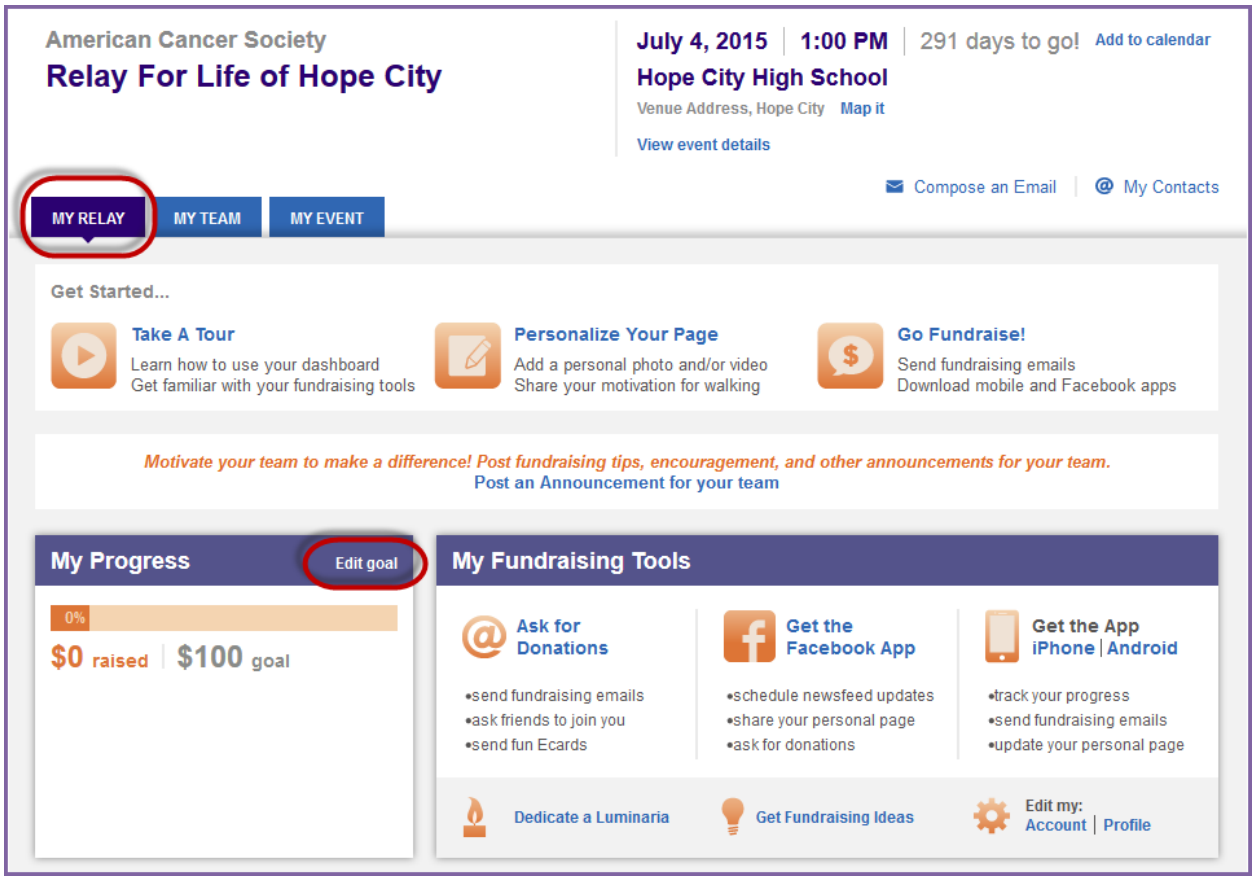
As an online Relay participant, you have a personal webpage that allows you to share your reason to Relay while also recognizing your fundraising success and donors. This section of the manual will provide you with instructions on how to view and edit your personal Relay webpage.

Update Your Fundraising Goal

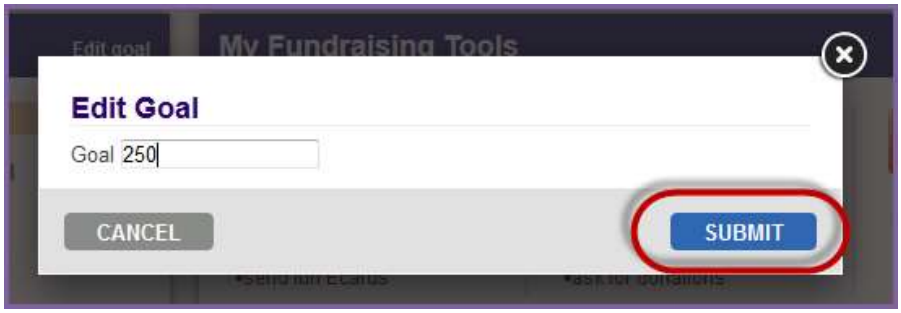
You can set a fundraising goal during the registration process; this goal may be updated and increased as you reach fundraising success.

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Relay tab, click **Edit Goal** in the **My Progress** box (top left hand side).



3. Enter a new individual fundraising goal before clicking **Submit**.



Customize Your Personal Page

As an online Relay participant, you have access to a personal fundraising page that can be customized to reflect your reason for getting involved in Relay For Life and can be used to collect lifesaving donations.

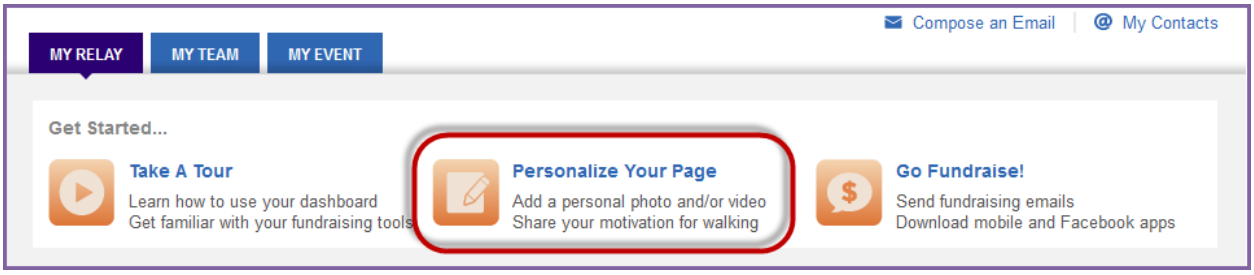
Edit Your Personal Page

The Relay Dashboard offers you the opportunity to edit and update your personal fundraising page. By sharing your reason to Relay and photos or video, you can create a compelling webpage for your team building and fundraising efforts.

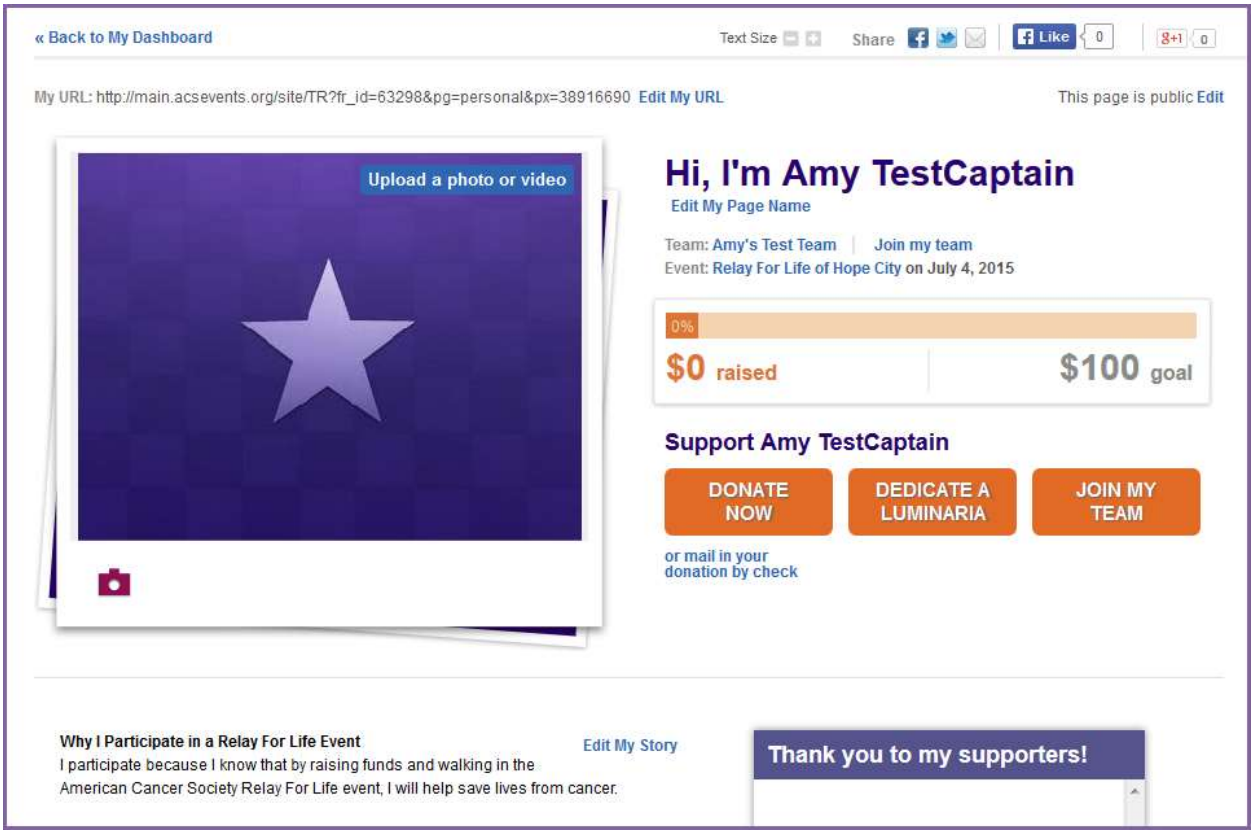
Did you know? Relay participants who update their personal page raise on average 7 times more than those who do not. Begin your Relay experience by customizing your personal Page.

1. Using your username and password, log into your **Relay Dashboard**.

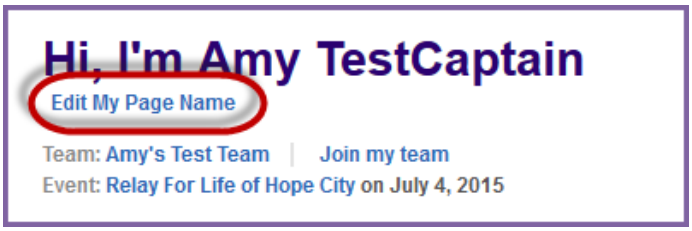
2. From the My Relay tab, click the **Personalize Your Page** link under the Get Started header (top of the page).



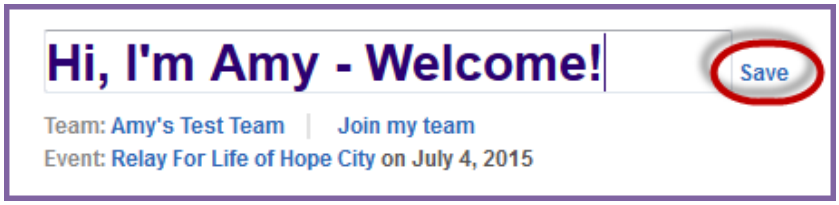
3. Your personal page will appear with several links so that you may make the appropriate edits.



4. Edit the **title** of the page.
   a. Beside the header of the page, click **Edit My Page Name**.

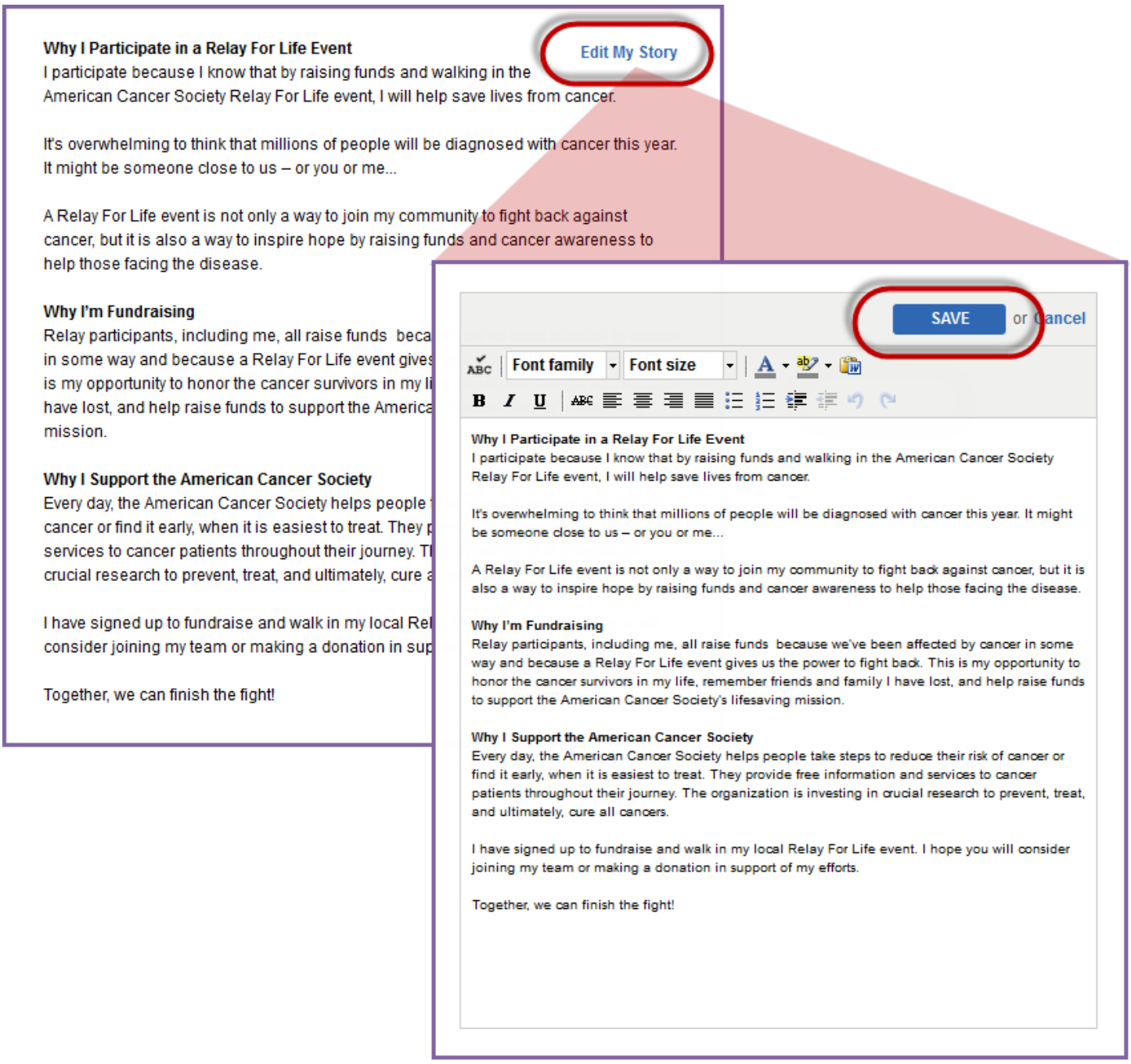


   b. Enter a new page title and click **Save**.



5. Edit your story:
    a. Beside the message of the page, click **Edit My Story**.

    b. Enter new content to your page before clicking **Save**.
        i. You can use the toolbar to format the text in your Relay Story
        ii. **Do not copy and paste content from an external source**, as hidden text formatting may affect the overall page display.



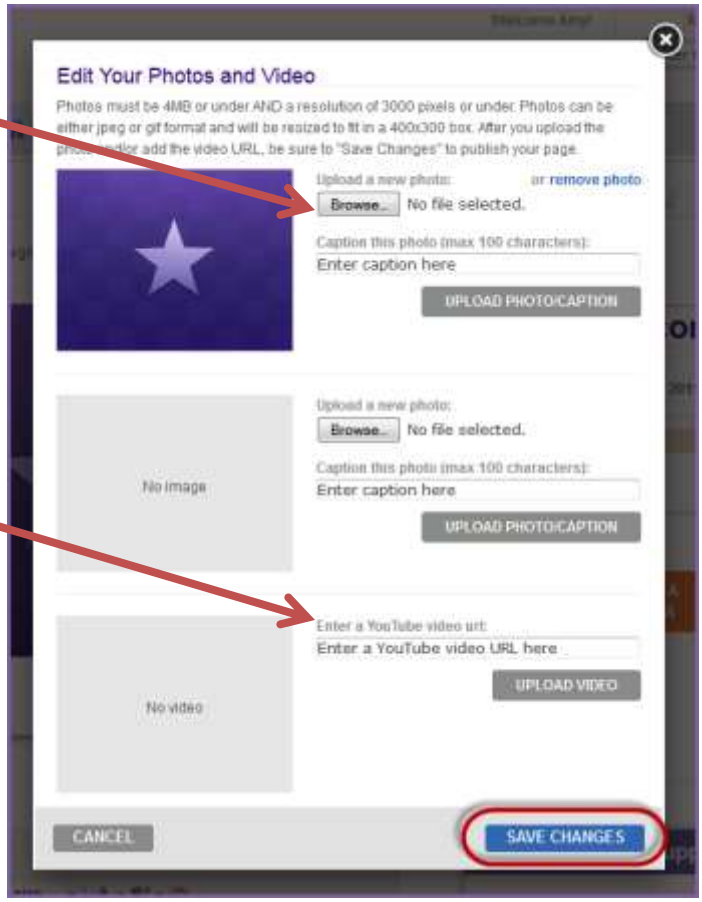
Upload a photo or video to your Personal Page

1. To add a photo or video to your personal page, click the **Upload Photos/video** button beside the photo area.

a. **Photo** – Insert up to 2 images to display on your personal page by uploading a file that contains a digital photograph. You may upload photos up to 4MB and 300x400 pixels.

- *Before you upload your image file, you may want to open it in your favorite graphics application and resize or crop the image to ensure the best fit, especially if the photo is quite large. Here is an easy web-based photo resizer you can use to get your pictures down to the right size: http://www.picresize.com/*

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



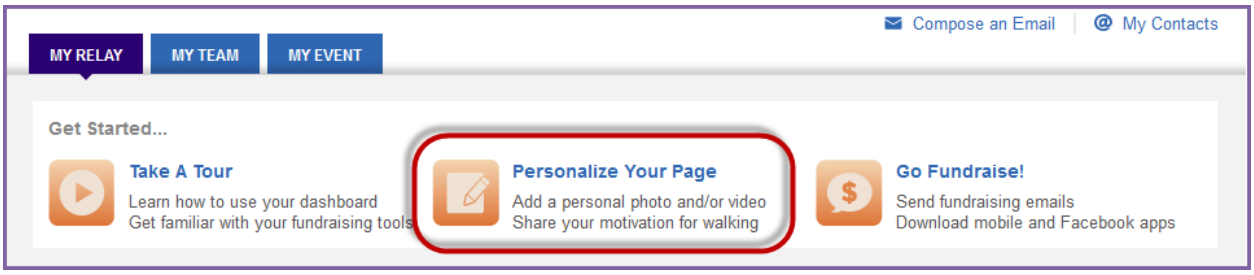
b. **Video** – Insert a video to display on your personal page by uploading a URL link that contains the video clip.

i. Enter the URL to a video to see the clip embedded on your personal page and
ii. Click **Save Changes** to see your new video reflected on the personal page**.**

Create a Personal URL

1. Using your username and password, log into your **Relay Dashboard**.

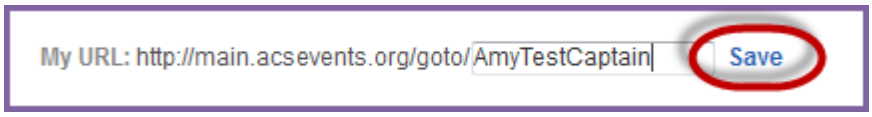
2. From the My Relay tab, click the **Personalize Your Page** link under the Get Started header (top of the page).



3. Your personal page will appear with several links so that you may make the appropriate edits.

4. At the top of the page, find the **My URL** information.

5. Click **Edit My URL** to create a personal page URL to your webpage. Enter in the end, personal section of the URL. Example for personal page URL: http://main.acsevents.org/goto/MelissaSmith



6. Click **Save.** Once a personal URL has been created, the participant may add it to their email signature, post it on the Social Media sites, and provide a direct link for potential donors on paper materials.

Chapter 5: Emailing From Your Relay Dashboard

- Manage Your Address Book
    - Access Your Address Book
    - Import Contacts into Your Relay Dashboard Address Book
        - Import Contacts from your Personal Email Provider
        - Import Contacts from a CSV File
    - Manually Add Contacts to Your Address Book
    - Edit a Contact
    - Delete a Contact
    - Create an Email Group
- Manage & Send Emails
    - Edit & Send a Message
    - Track Email Contacts

Sending emails from the Relay Dashboard is an easy way to spread the Relay For Life mission to end cancer and secure lifesaving funds.

This section of the online manual will show how easy it is to send email messages and follow up with your friends, family, and colleagues as you generate support for Relay For Life.

Did you know? Relay participants who send emails from the Relay Dashboard raise on average 6 times more than those who do not. Begin your Relay experience by sharing the news through email to your family, friends, and peers.

Managing Your Address Book

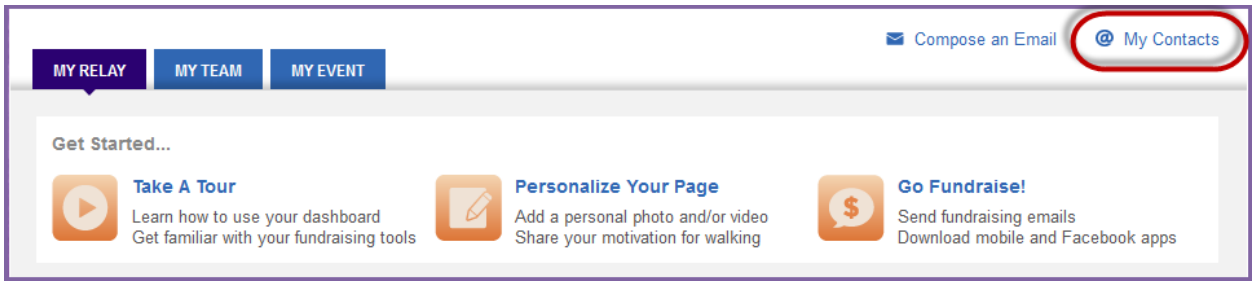
As an online Relay participant, you can manage an Address Book in the Relay Dashboard, making it easy to send emails to your friends, family, and co-workers asking for their support. After creating and managing your Address Book, with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

***Note**: The contact information in your address book is strictly for your use. Neither the American Cancer Society nor web system will send unsolicited email (spam) to your contacts in your address book, or sell the information to a third party.*

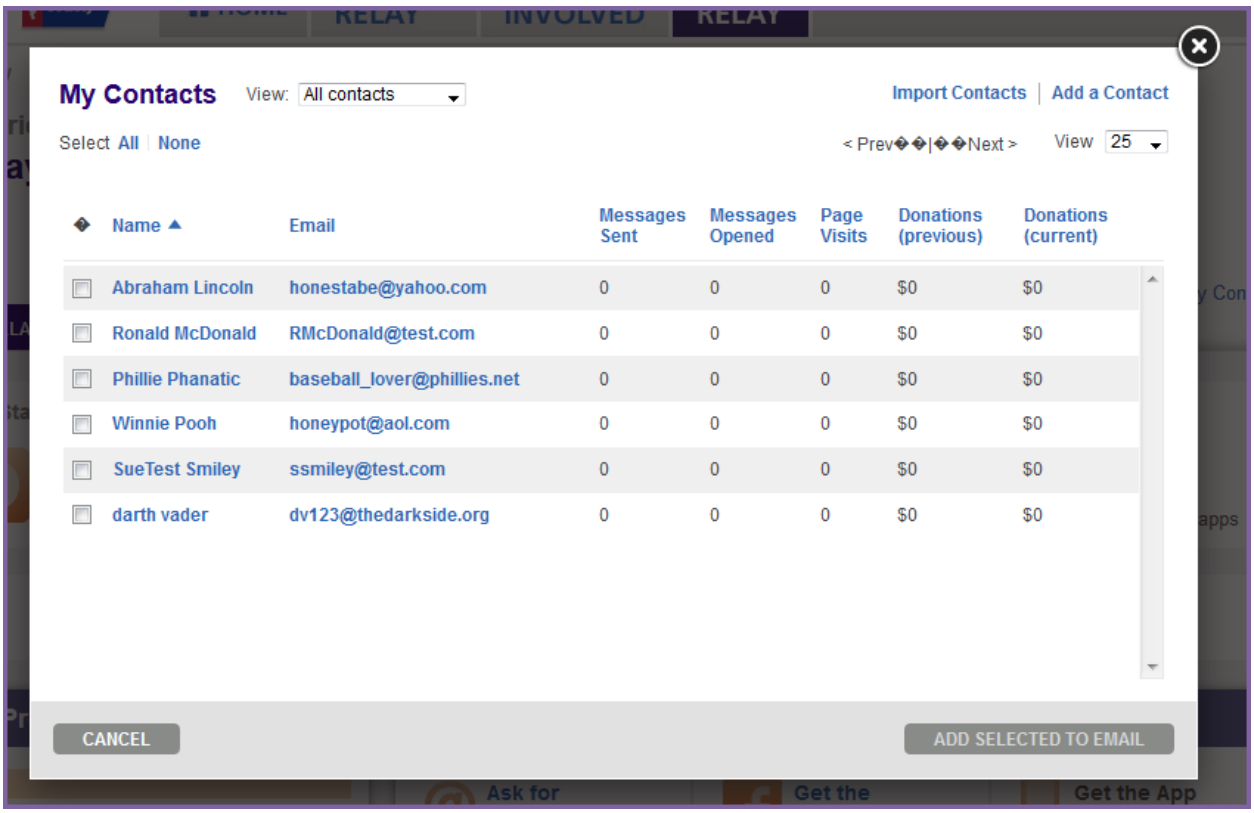
Access Your Address Book

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.



3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
    a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.



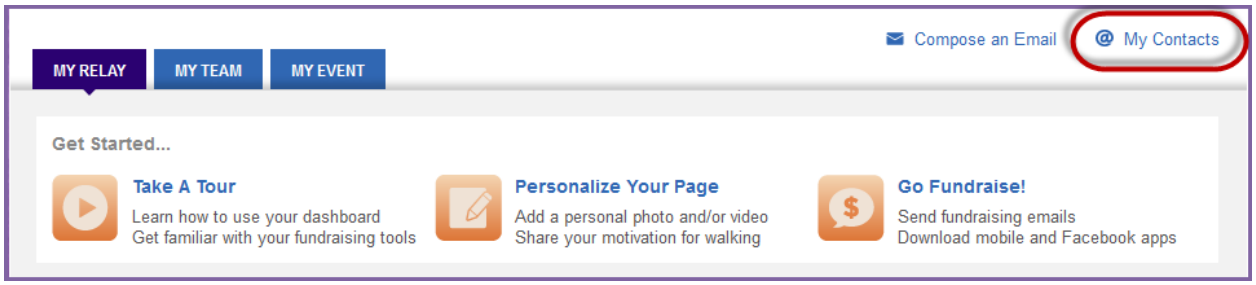
Import Contacts into Your Relay Dashboard Address Book

Before sending an email to your family and friends asking for support, take a moment to upload your contacts into the Relay Dashboard. This will make emailing even easier; with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

Import Contacts from your Personal Email Provider

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.



3. At the top of the **Contacts** overlay, click the **Import Contacts** link.

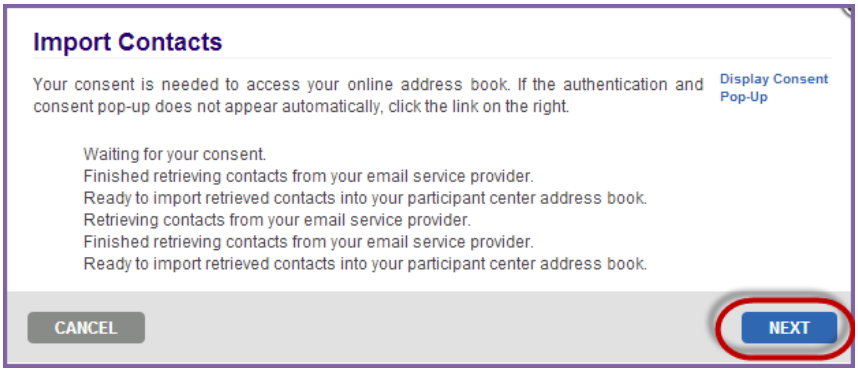
4. Choose the email service provider where your contacts are stored by **clicking the button** beside the source. Choose **Next**.

If you use an email service other than Gmail or Yahoo!, please export your current address book as a CSV file. Once the CSV file is created, you may upload them into the Relay Dashboard. More directions about importing a CSV file are available in the following section.

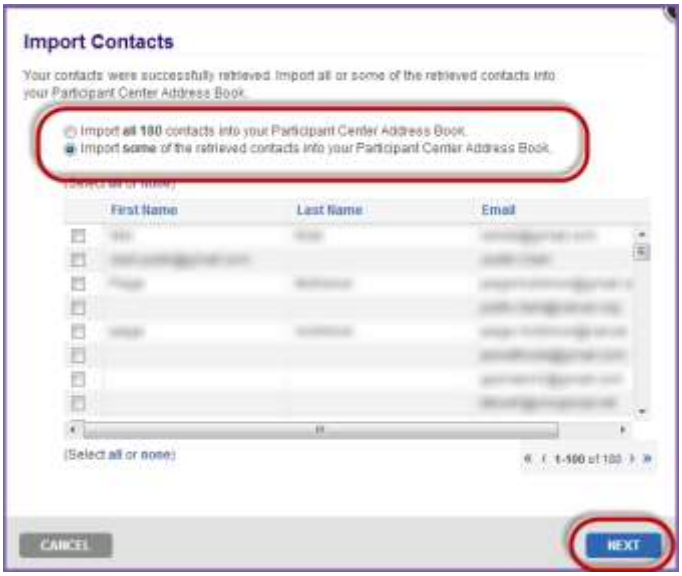
5. Enter the username and password for your email program and click **Sign In**.

6. Allow the Relay For Life website access to your email contacts by clicking **Grant Access**.

7. **Read** the consent agreement to allow the Relay Dashboard to access your online address book. **Click Next**.

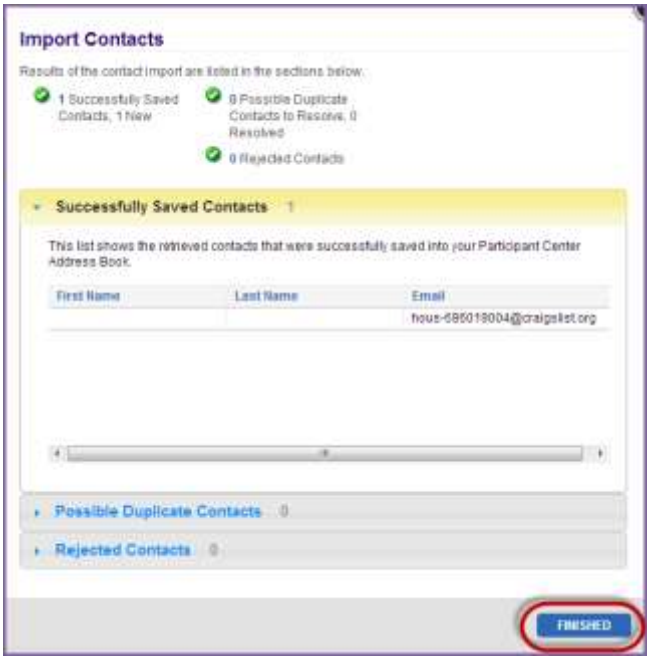


8. Determine if you wish to import all, or only some, of your email addresses into the Relay Dashboard by **checking the appropriate radio button.**



   a. If not all contacts are selected, individually choose which email addresses are to be uploaded by **checking the box** besides each record.
   b. Click **Next**.

9. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking **Finish**.

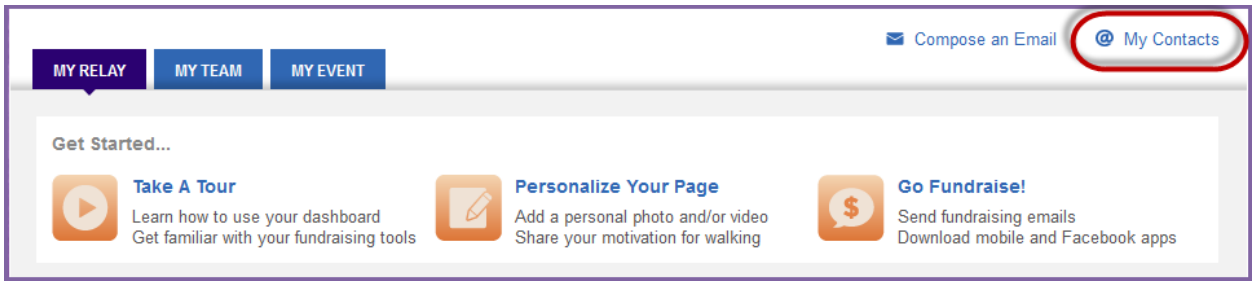


10. Your personal email Address Book has been successfully uploaded into the Relay Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

Import Contacts from a CSV File

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.



3. At the top of the **Contacts** overlay, click the **Import Contacts** link.

4. Choose to import your email addresses as a CSV file. Choose **Next**.

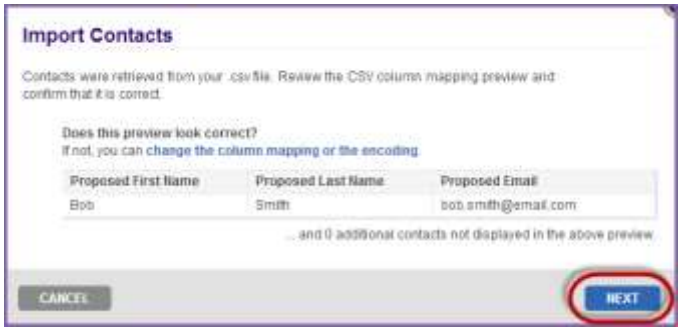
a. Before uploading your contact file, ensure that the document is in the proper format and saved as a CSV or comma delimited option document as exampled below.

First	Last	Email
Bob	Smith	bob.smith@email.com

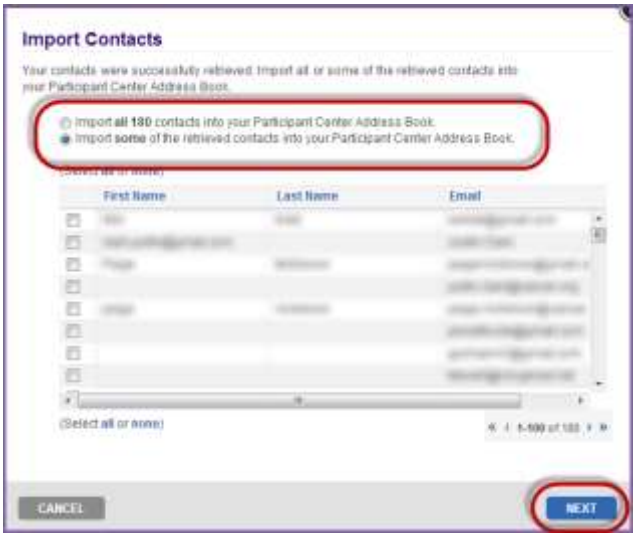
b. More instructions regarding formatting the CSV email address file can be found here

5. Browse for the CSV file on your computer before clicking **Next**.

6. Review the preview of the addresses that have been uploaded into the Relay Dashboard. Click **Next**.

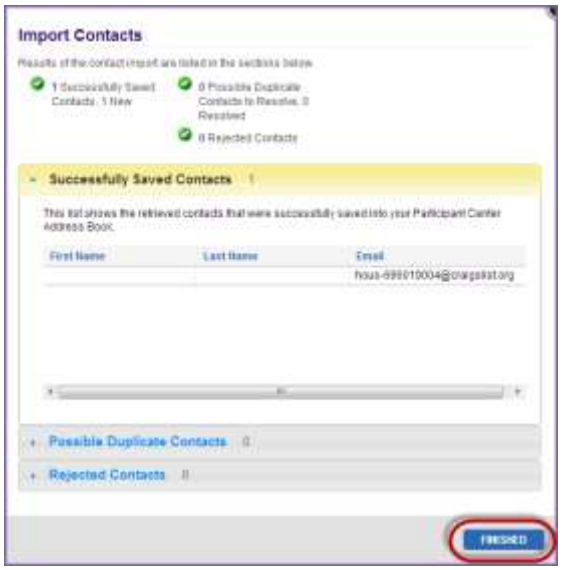


7. Determine if you wish to import all, or only some, of your email addresses into the Relay Dashboard by **checking the appropriate radio button.**



a. If not all contacts are selected, individually choose which email addresses are to be uploaded by **checking the box** besides each record.
b. Click **Next**.

8. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking **Finish**.

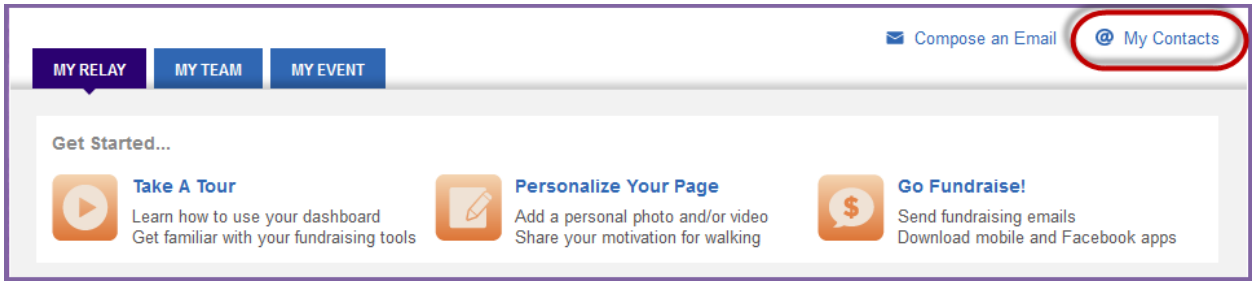


9. Your personal email Address Book has been successfully uploaded into the Relay Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

Manually Add Contacts to Your Address Book

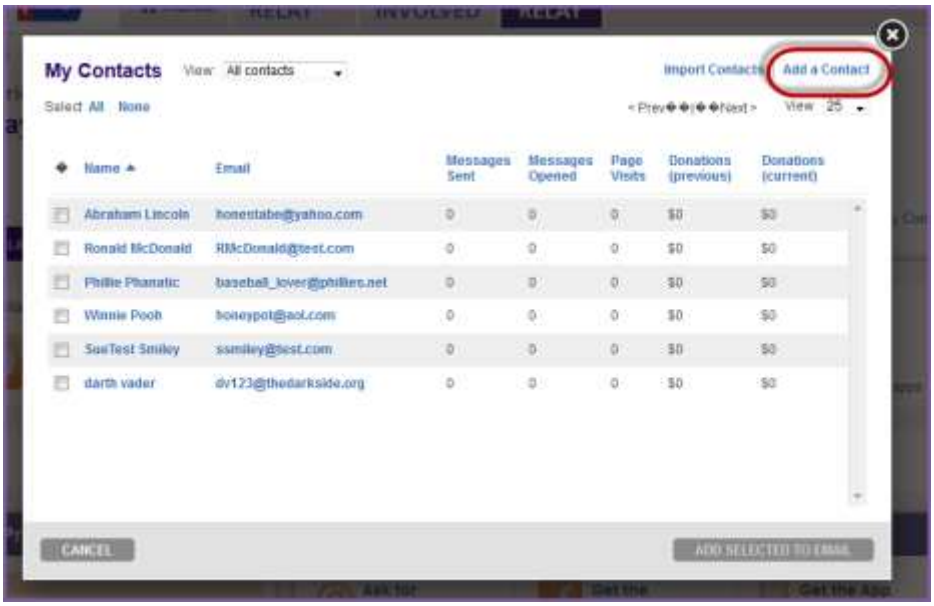
1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

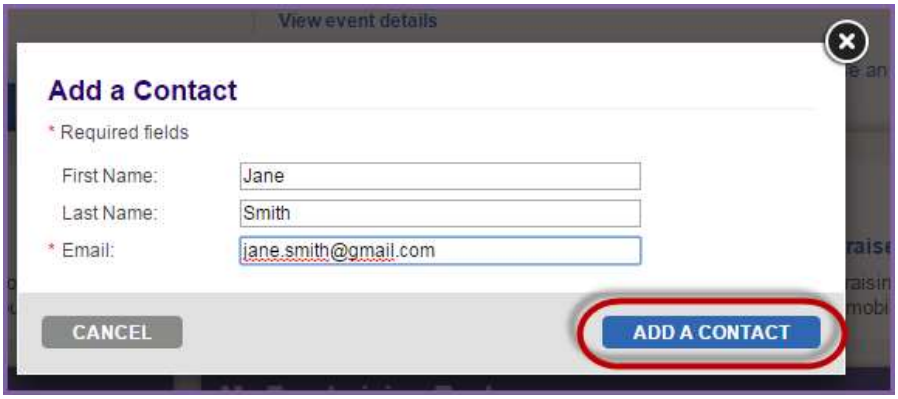


3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
    a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.

4. To manually add a new contact, simply click on the **Add a Contact** link in the upper right-hand corner.



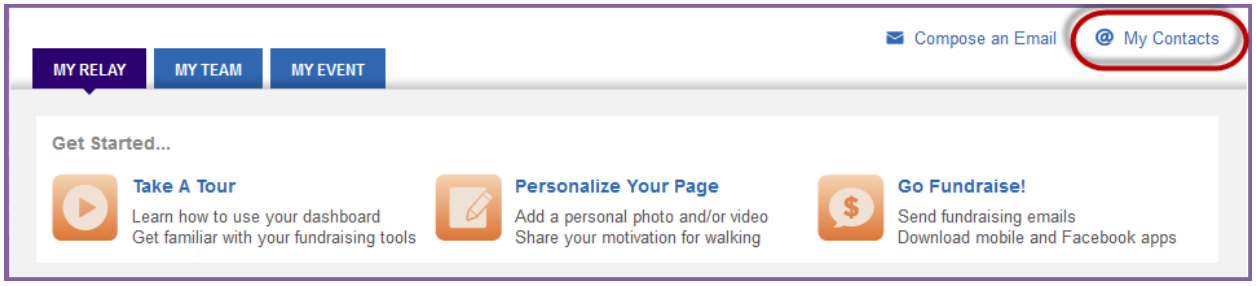
5. Add the new contact's First Name, Last Name and Email and click **Add a Contact**.



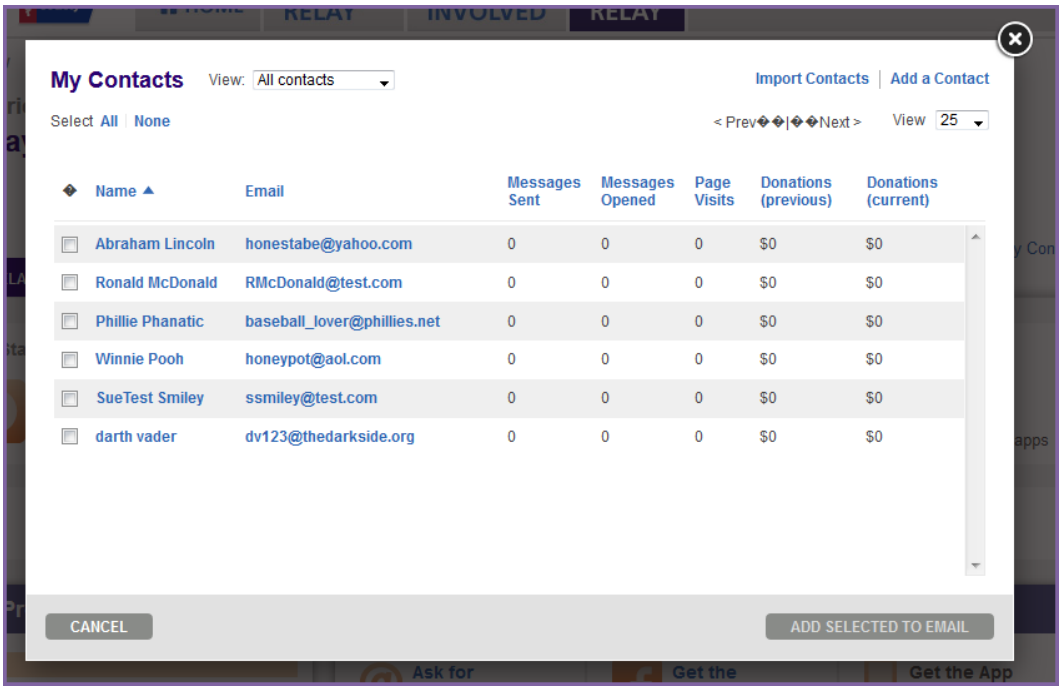
Edit a Contact in your Address Book

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

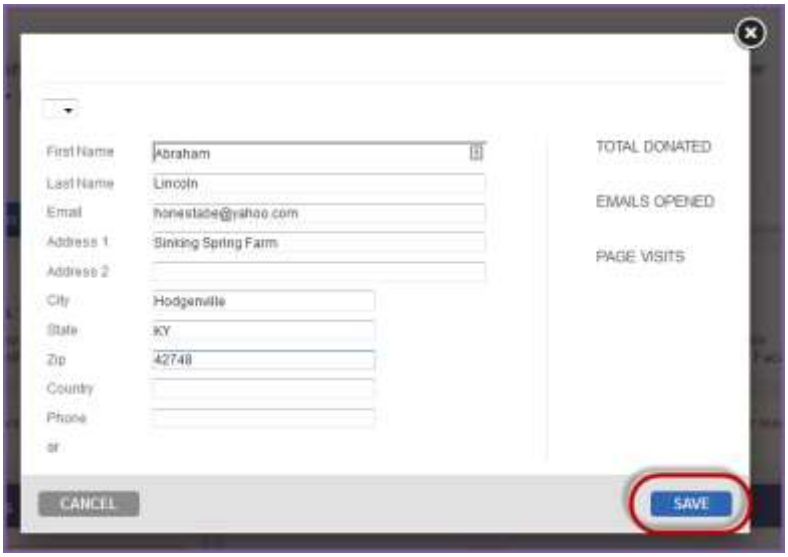


3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
    a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.



4. Simply click on the name of a contact you wish to edit.

5. Update the contact's information and click **Save**.

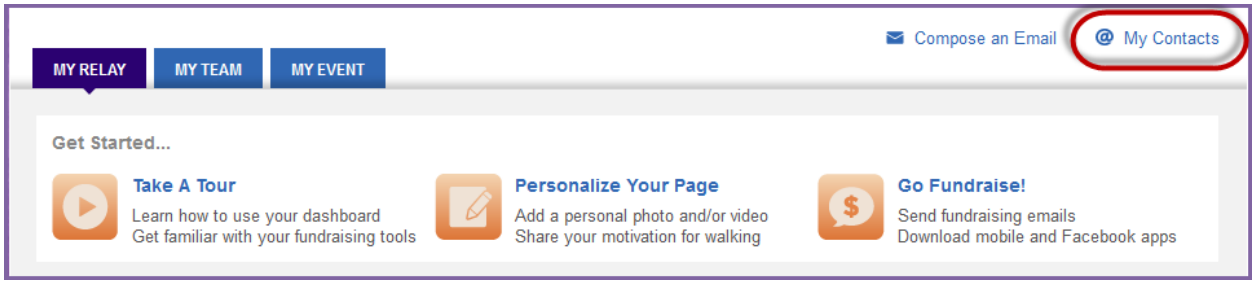


Delete a Contact in your Address Book

Please note, some contacts in your address book cannot be deleted. Team members and donors cannot be deleted from your address book.

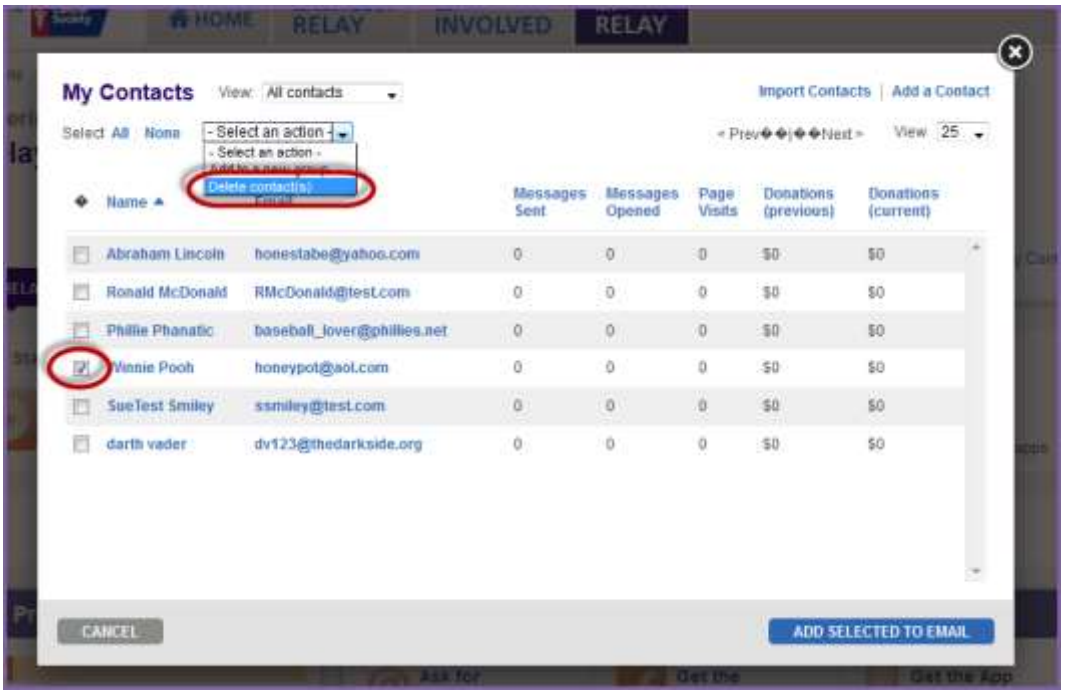
1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

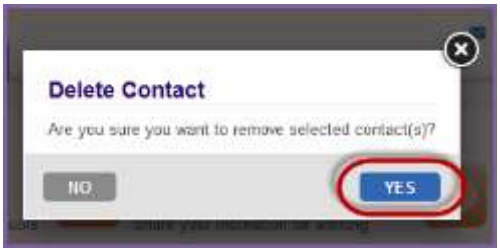


3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts' name you wish to delete.

4. From the Select an action drop down menu, click **Delete contact(s)**.



5. **Confirm** to delete the contact from the Relay Dashboard Address Book.

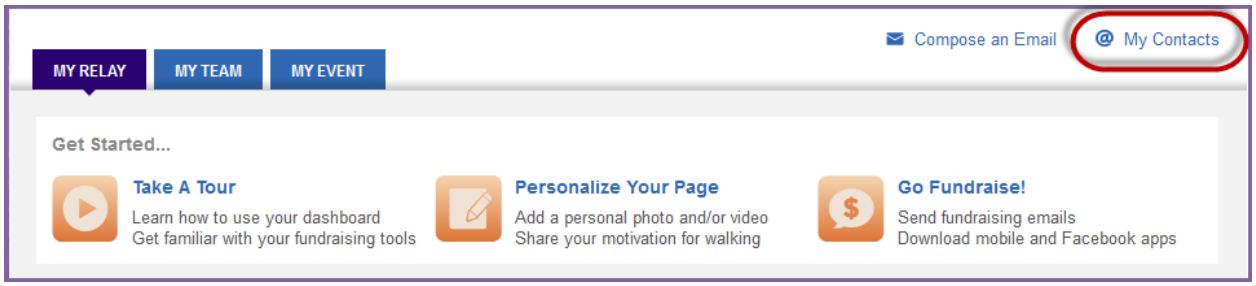


Create an Email Group

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

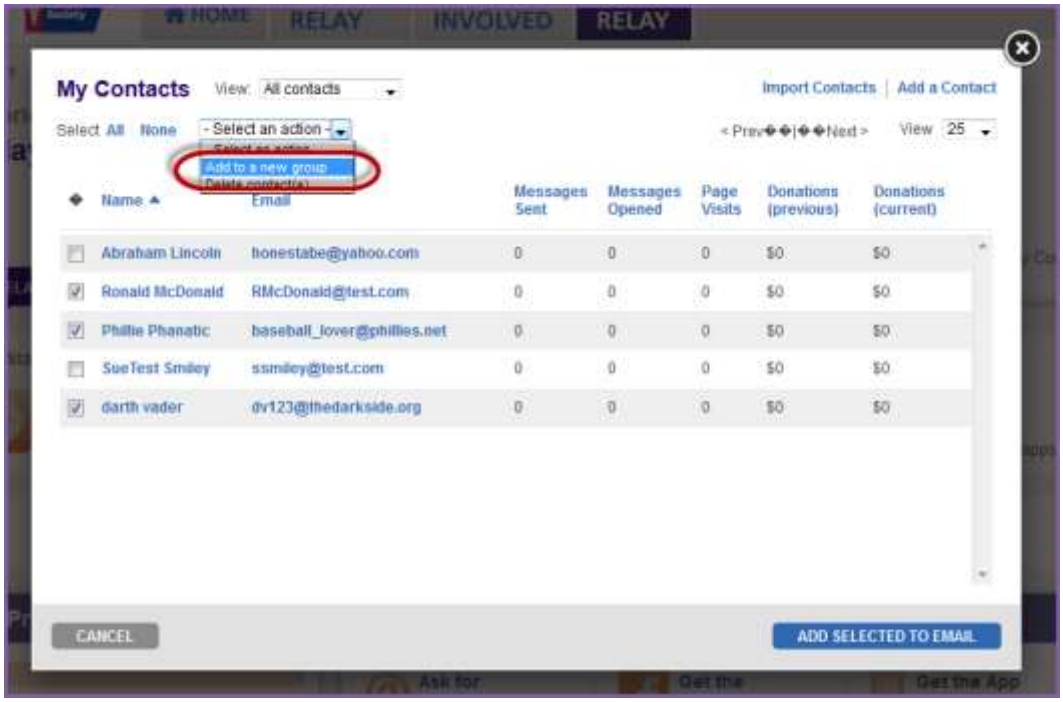
1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

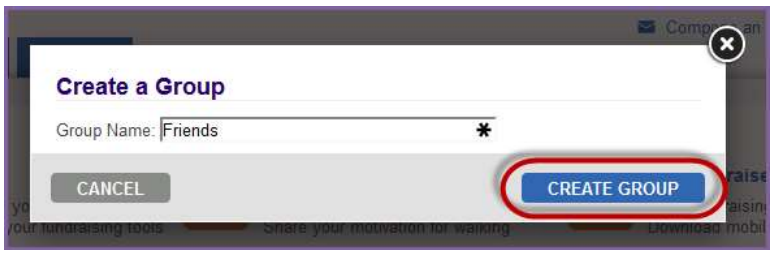


3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts' name you wish to add to a new email group.

4. From the Select an action drop down menu, click **Add to a new group**.



5. Provide the group with a name and click **Create Group**.



6. Once a group is created and contacts have been tied to the group, you can easily send emails to all group members simply by typing the group name into the email To: field

Manage and Send E-mails

The number one reason why people donate to the American Cancer Society Relay For Life is because someone asked. Take advantage of the tools available in the Relay Dashboard to ask your family, friends, and co-workers for support in the fight against cancer.

Using a well-crafted team building or donation request emails can help direct people to your personal page quickly and encourage support. All emails from the Relay Dashboard will automatically link the recipient back to your personal page and team page.

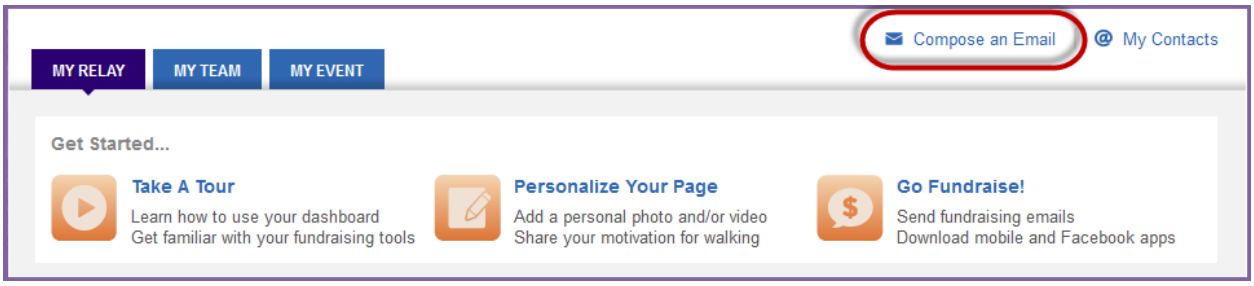
As you begin sending email messages, note that you can use the template emails available, save your own versions, or create a brand new message that speaks best for you.

Start sending emails today and watch your team and fundraising soar!!

Edit and Send a Message

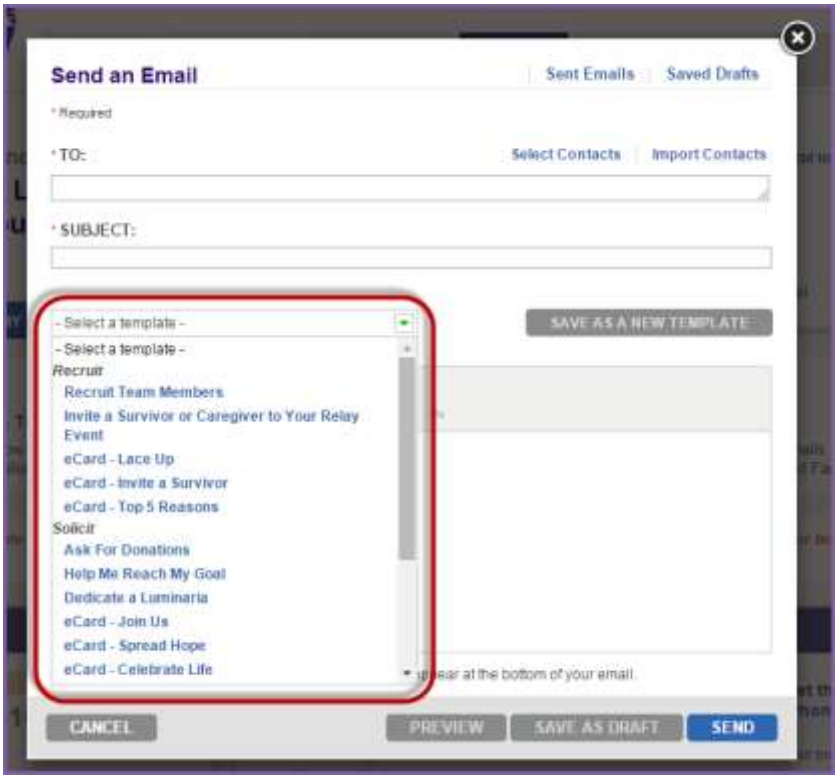
1. Using your username and password, log into your **Relay Dashboard**.

2. From any section of the Relay Dashboard, click the **Compose an email** link found on the right hand side of the page.



3. The **Send an Email** overlay will appear.
    a. Your name and your email address will automatically populate as the sender's address.
    b. Begin typing the names of those you wish to email into the To: field. If email addresses are already in the Address Book, they will begin to auto-populate.
    c. Click **Select Contact(s)** or **Select Group(s)** if you would like to see more options of individuals you may send the message to.

4. If you need help deciding what to write in your email, choose one of the template messages. Click on the **Select a template** drop down menu to see the suggested messages available (i.e. Thank a Donor) Once you select the template of your choice, the email will appear for you to personalize or send as is

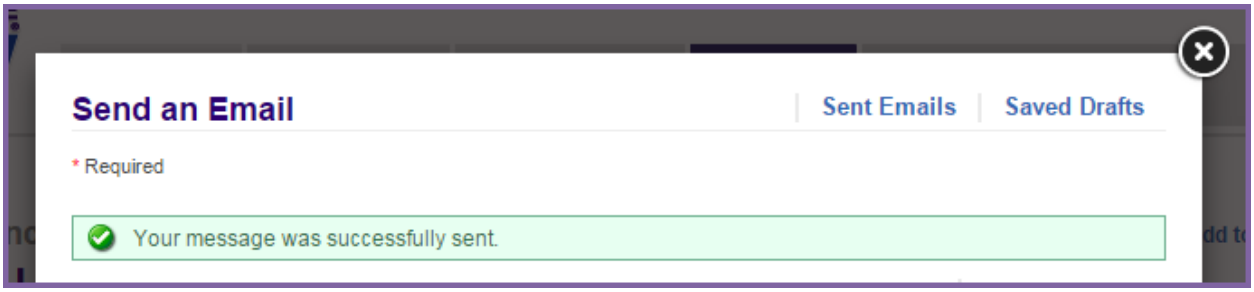


5. Make any changes to the **Subject** and the **Message** text.

6. Click **Preview** to see your email message before you send it.

7. Click **Save as Draft** if you want to save this message for future use.

8. Click **Send** to deliver this message to everyone you have added as a recipient of this email. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.

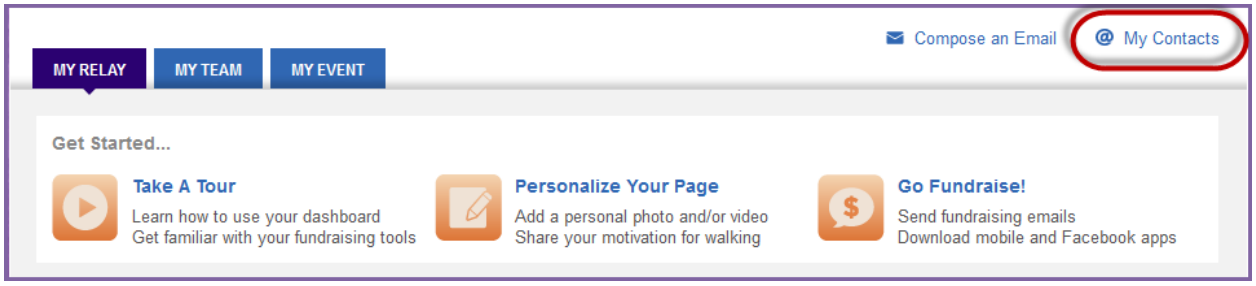


Track Email Contacts

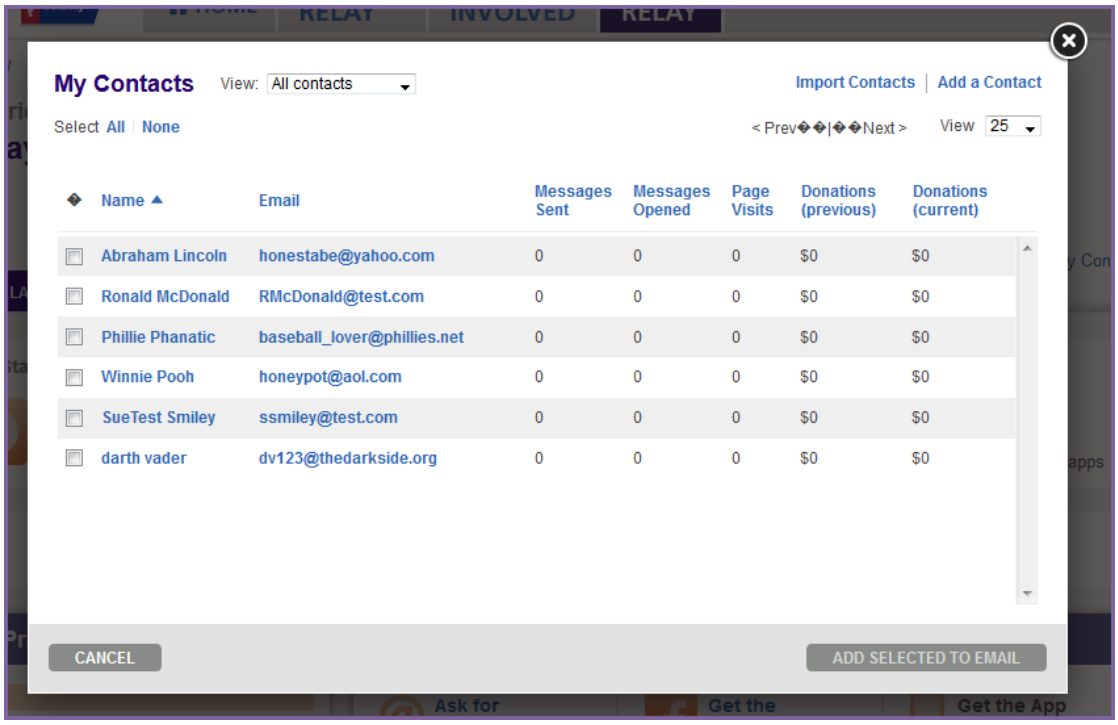
By sorting your Relay Dashboard Address Book, you can easily track people that you've sent messages to, who have joined your team, and who have made donations to you. You can also keep track of those needing follow-up or Thank You emails.

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

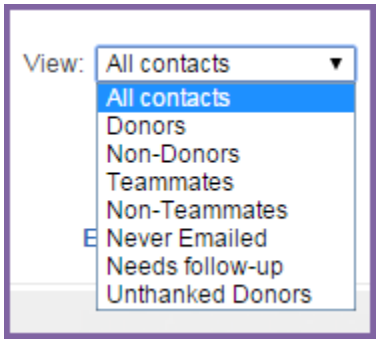


3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.



4. **Review** the columns beside each email contact to see the number of emails that you have sent to each individual, the number of emails opened, and if the contact has viewed your page or made a donation.
    a. **Check the box** beside any of the contacts that you would like to email based on the information displayed. After selecting the contacts, click **Add Selected to Email**.

5. Use the drop down menu to filter the email contacts by groups.
    a. **Donors:** Sort the list of individuals by those who have made a contribution so that you can be sure to thank them.
    b. **Non-Donors:** Ask for support from those who have not made a gift online.
    c. **Never Emailed:** Be sure to reach out to those who you have not yet emailed.
    d. **Need follow-up:** Send another email to those who need a reminder message



6. You can send emails to the members of a certain group by selecting the individuals within the desired group. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message, and follow the steps outlined above to compose and send your message.

Chapter 6: Managing Your Fundraising Success

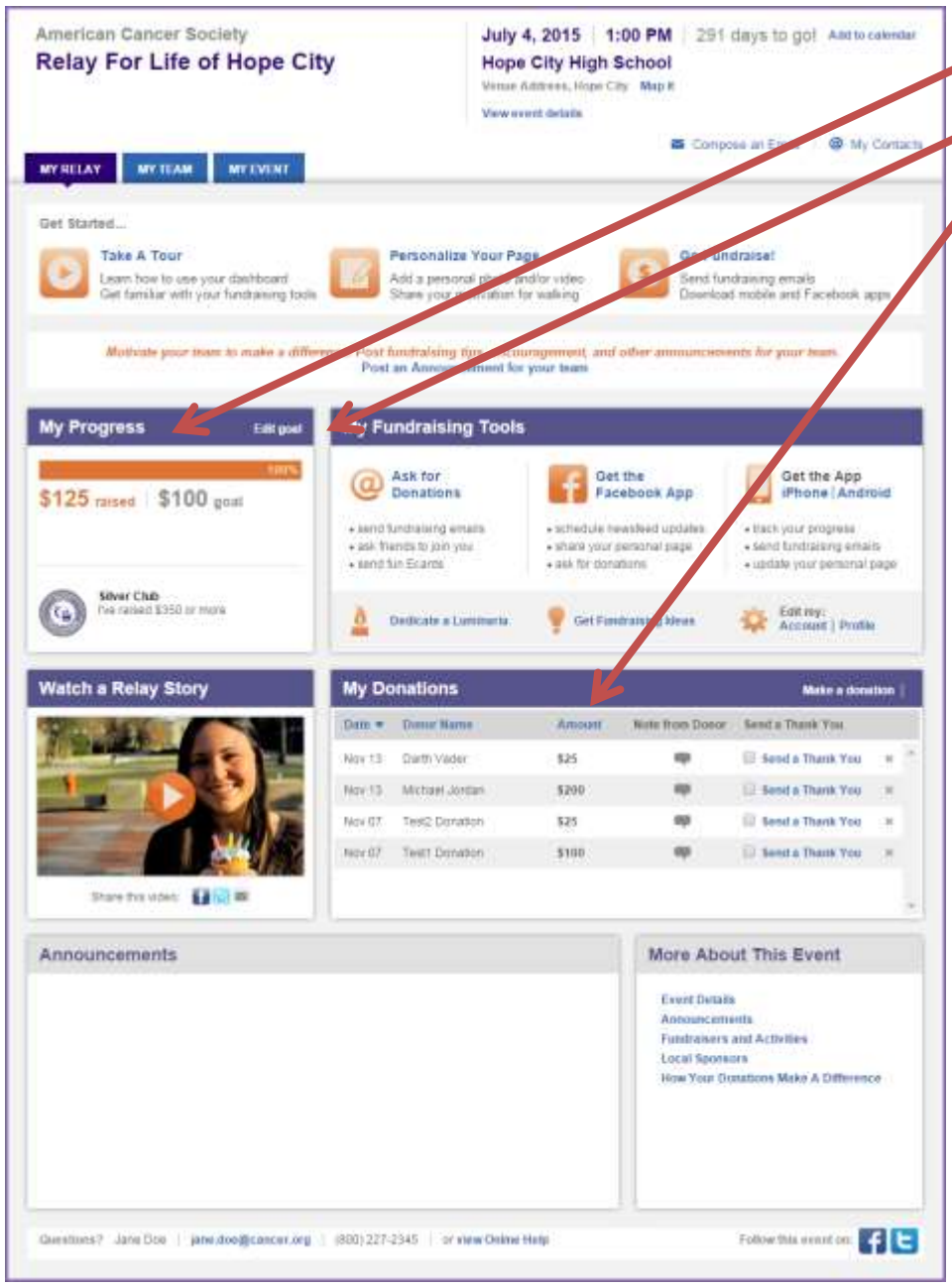
- View Your Online Fundraising Progress
- View a List of Donors

After registering as an online Relay participant, you have great tools available to support your fundraising efforts. The Relay Dashboard can help you manage your gifts and donors while tracking your progress towards your fundraising goals.

View Your Online Progress

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Relay tab you can perform the following functions:

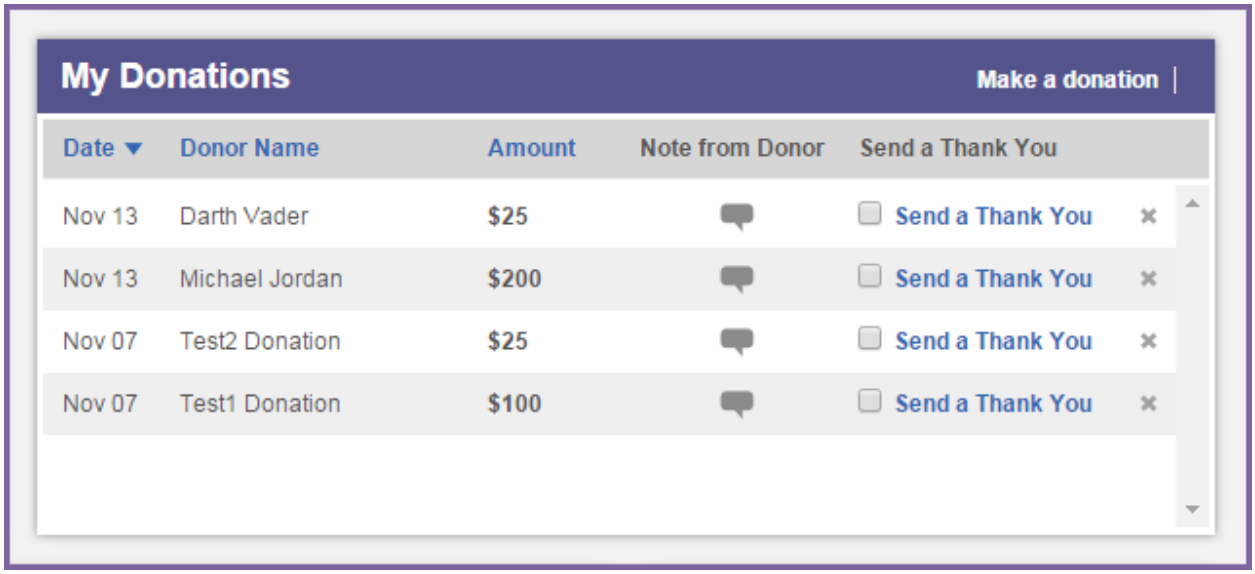


a. Track your fundraising progress with the **My Progress** area.
b. Edit Personal Fundraising **Goal.**
c. View your **Donation History.**

View a List of Donors

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Relay tab you can see a list of all donors who have contributed to your fundraising efforts. Here you may also view any personal messages sent by your supporters and directly connect to the email tool to send a thank you message.



Chapter 7: Tracking Your Team's Efforts

- View Team's Progress
- View a List of Team Members
- Share Fundraising Tips with Your Team

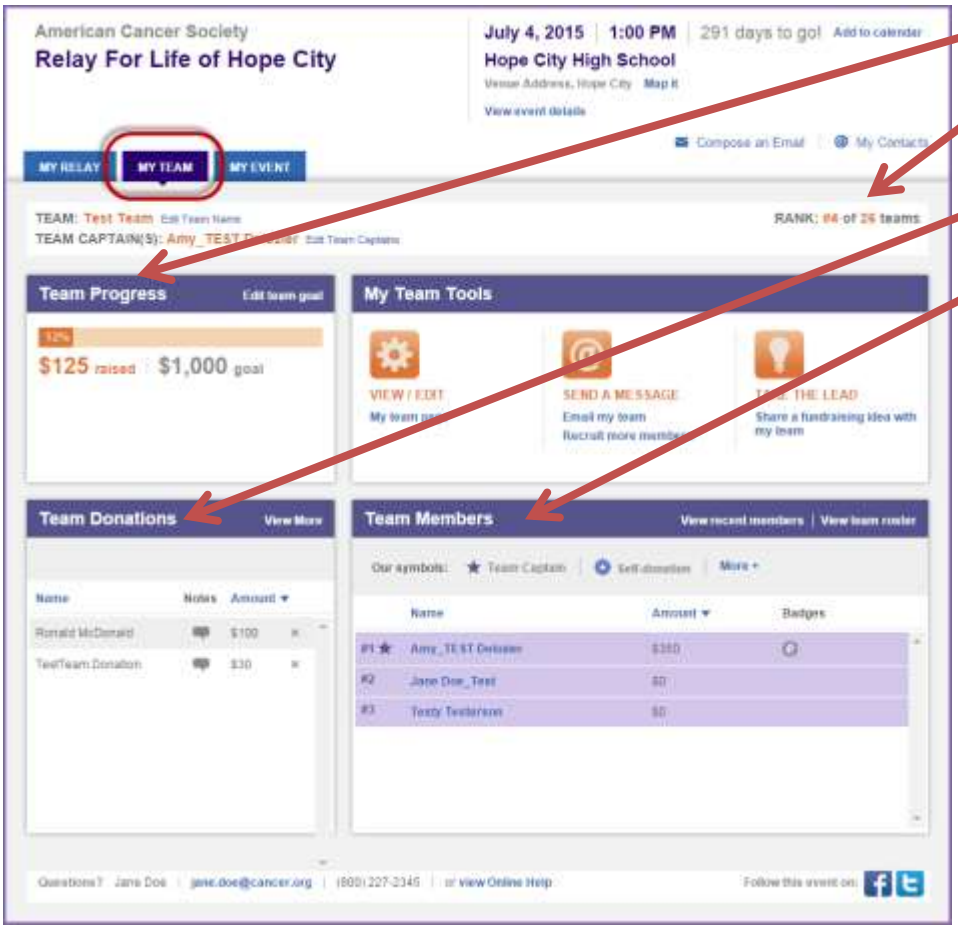
The Relay Dashboard allows team members and team captains the ability to monitor their collective efforts to fight cancer. The My Team section page displays a gift summary of donations made to all participants on the team, progress indicators, team gift history, and team member roster. The 'My Team' page is only available for Team Captains and Team Members; this page is not available for individuals not associated with a team.

If you are the team captain, you will see additional links and actions that can be made as you inspire your group to increase their efforts to end cancer. More information is available in the next chapter of the manual.

View Your Team's Progress

1. Using your username and password, log into your **Relay Dashboard**.

2. From the **My Team tab**, you can:



a. Track your team fundraising progress with the **Team Progress** area.

b. See how your team ranks among the other teams participating in your Relay

c. View your **Team Donation** History**.**

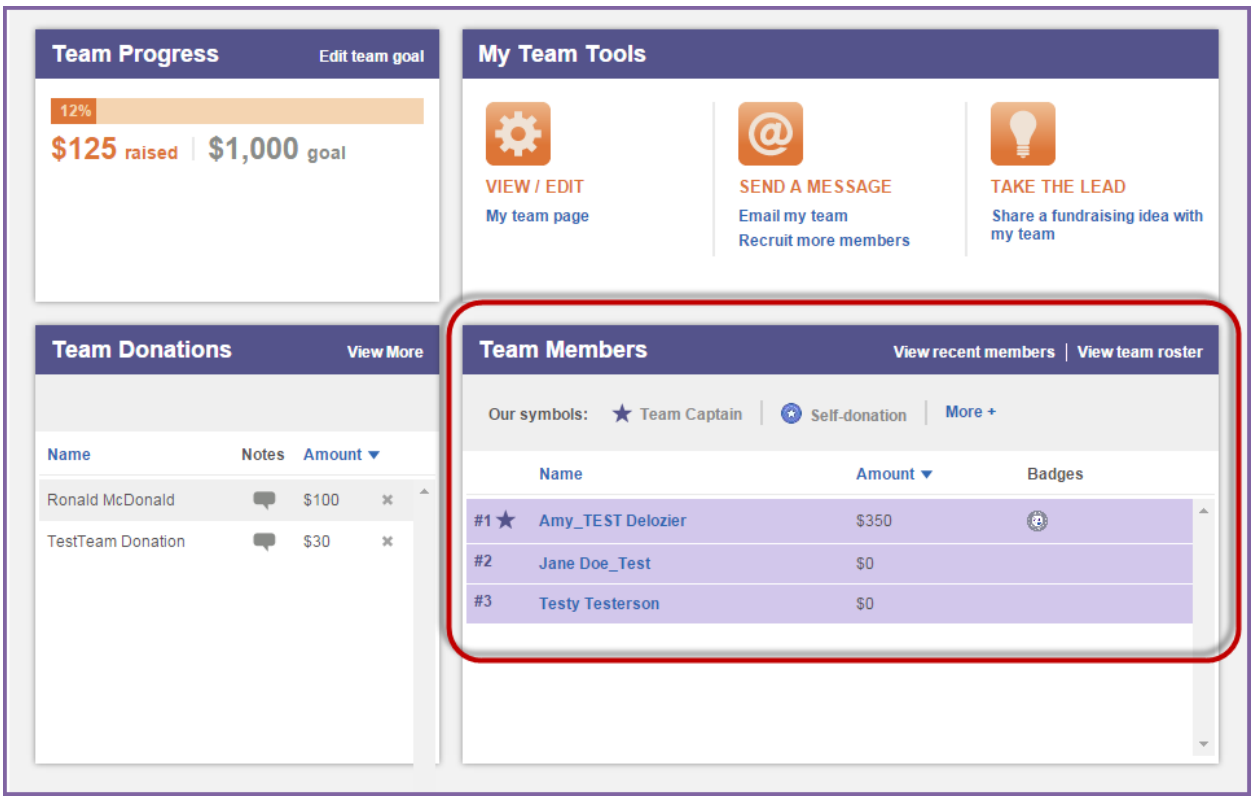
d. See a full list of team members, plus how much they've each raised

View a List of Team Members

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, locate the **Team Members** section (middle right hand side of the page).

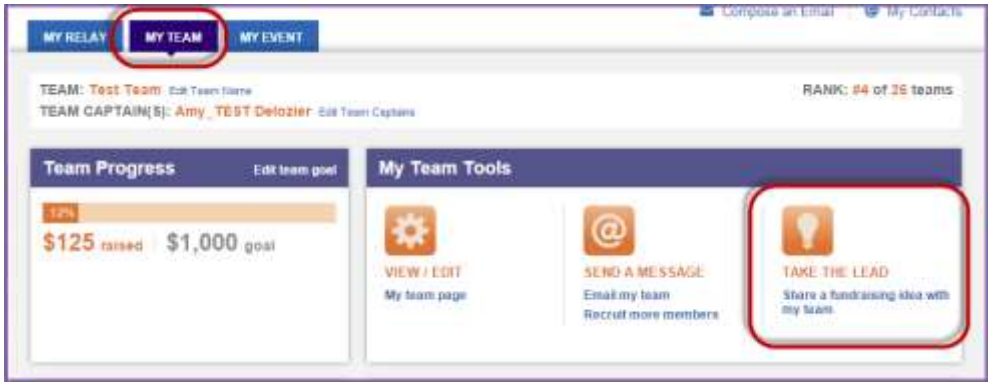
    a. See a list of all team members plus their fundraising successes and milestone levels.
    b. View members who have recently joined your team and connect directly with the Relay Dashboard email system to send them a welcome message.



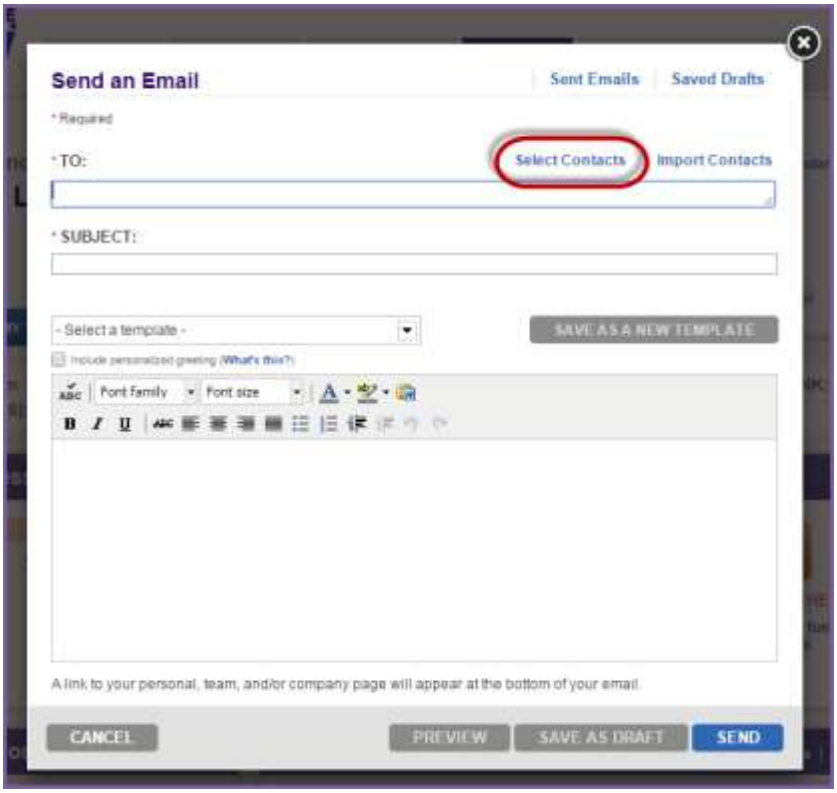
Share Fundraising Ideas with Your Team

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, click the **Share a fundraising idea with my team** link in the My Team Tools box (right hand side of the page).

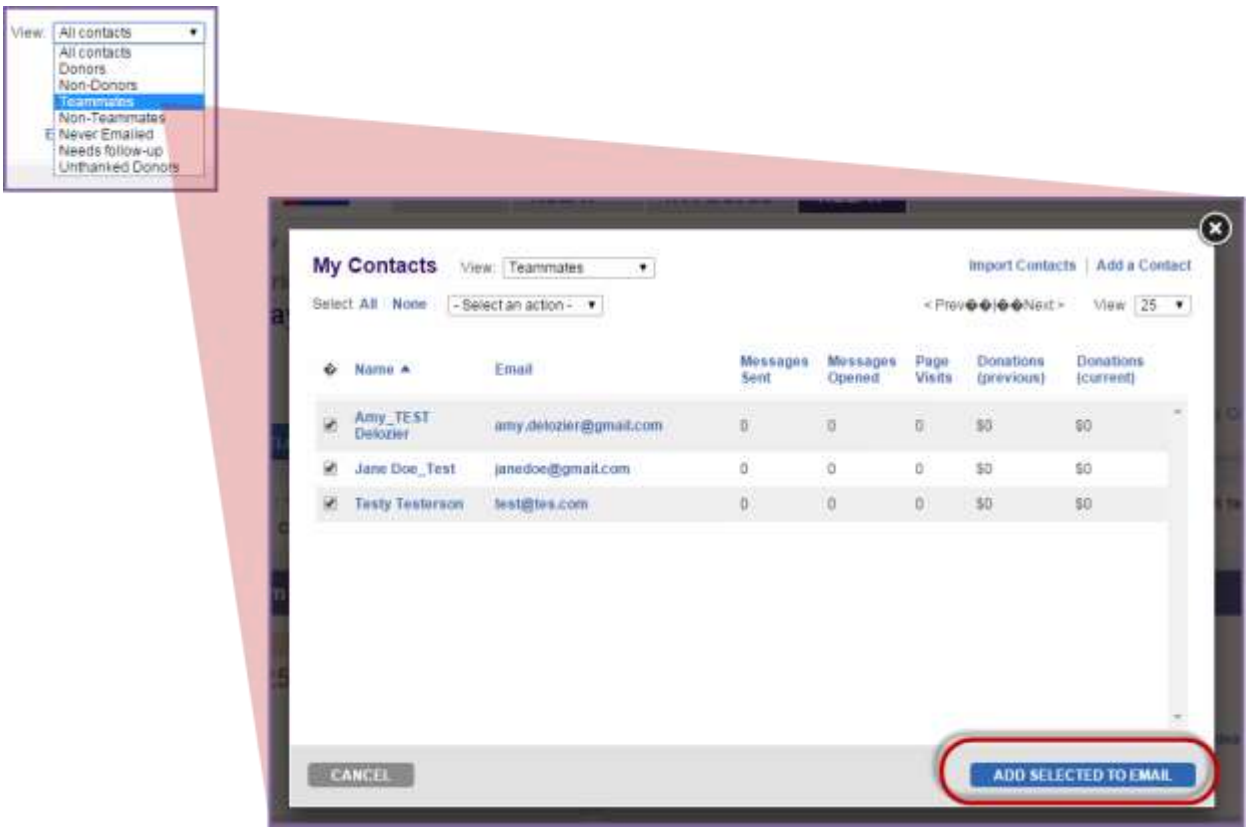


3. The **Send an Email** overlay will appear. At the top of the page, click **Select Contacts**.



4. Using the drop down menu to filter the email contacts by the **Teammates group**.

5. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message.

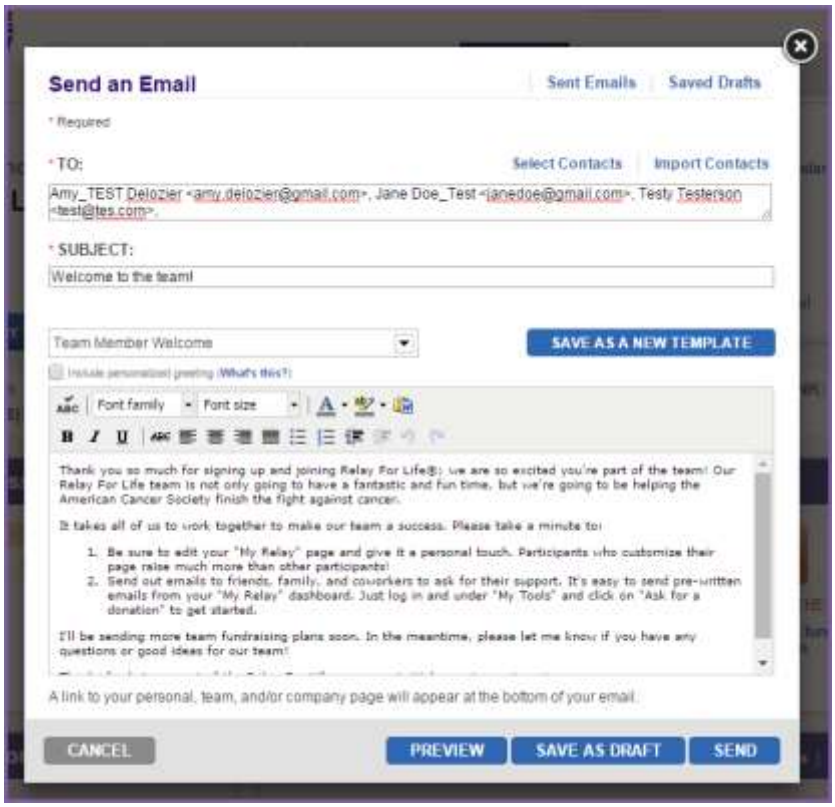


6. A message page will display with your selected individuals automatically listed in the **To**: field. Choose from any Suggested Messages or start crafting your own message from the blank email displayed.
    a. Your name and your email address will automatically populate as the sender's address.

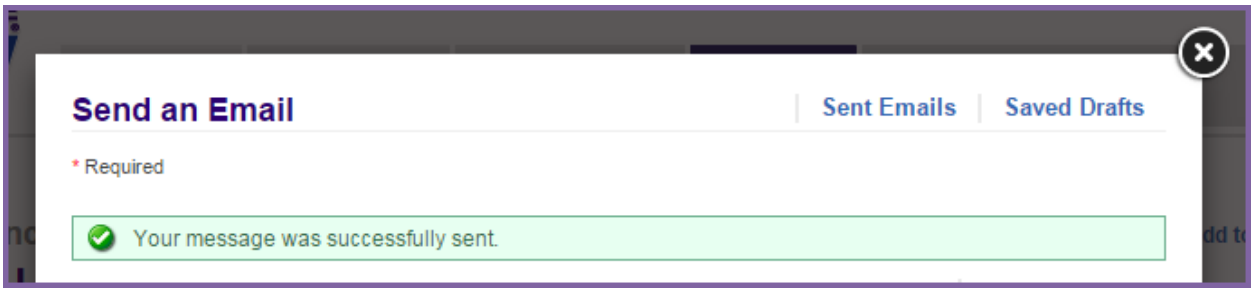
7. Make any changes to the **Subject** and the **Message** text.

8. Click **Preview** to see your email message before you send it.

9. Click **Save as Draft** if you want to save this message for future use.



10. Click **Send** to deliver this message to everyone you have added as a recipient of this email. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.



Chapter 8: Online Fundraising Tools – Team Captains Only

- Update Your Team Name
- Change the Team's Fundraising Goal
- View/Edit Your Team Page
- Create a Team URL
- Post an Announcement for your Team in the Relay Dashboard
- Send an Email to Your Team Members
- View Your Team's Progress
- View a List of Team Members

Team Captains are the leaders of Relay For Life, providing support and guidance to their teammates. The Relay Dashboard provides a number of tools specifically for Team Captains to help lead the group to success.

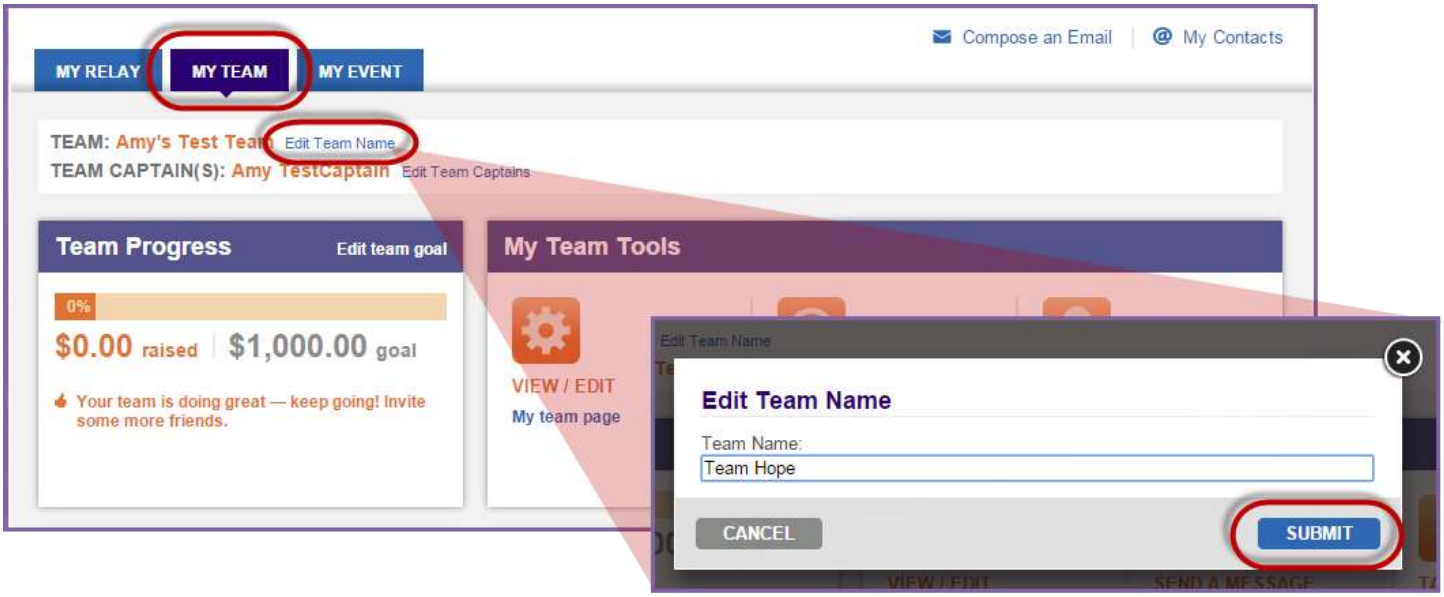
Enjoy these tools and have fun!

Update your Team Name

1. Using your username and password, log into your **Relay Dashboard**.

2. From the **My Team** tab, locate the team information at the top of the section. Click **Edit** beside the team name.

3. Enter the new team name and click **Submit** to save changes.



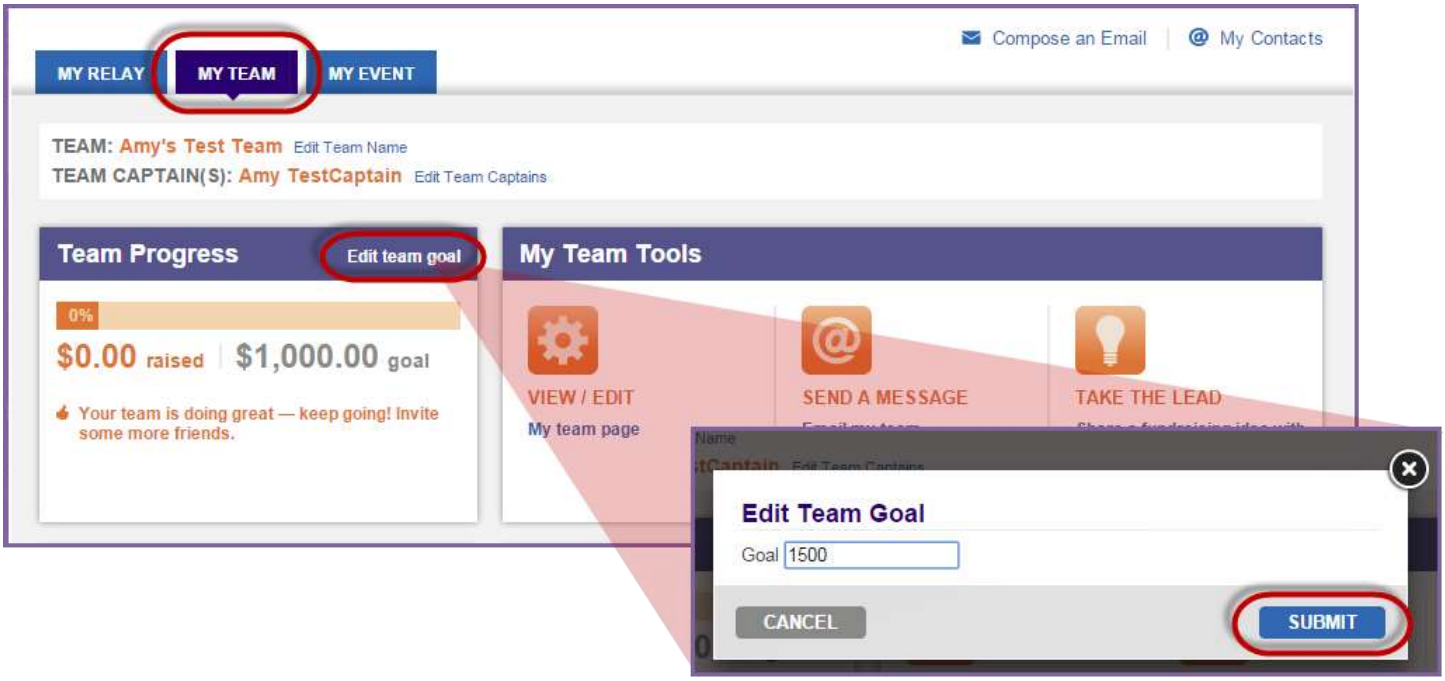
Change your Team Fundraising Goal

While the team captain may set a group fundraising goal during the registration process, this goal may be updated as you reach fundraising success.

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, click **Edit team goal** in the **Team Progress** box (top left hand side)

3. Enter a new team goal before clicking **Submit**.

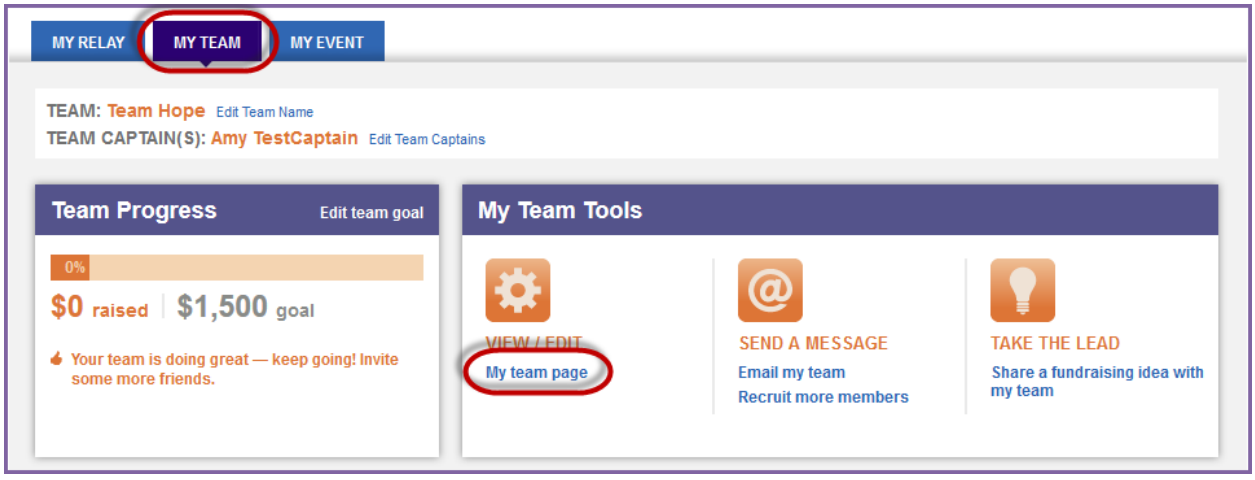


View / Edit Your Team Page

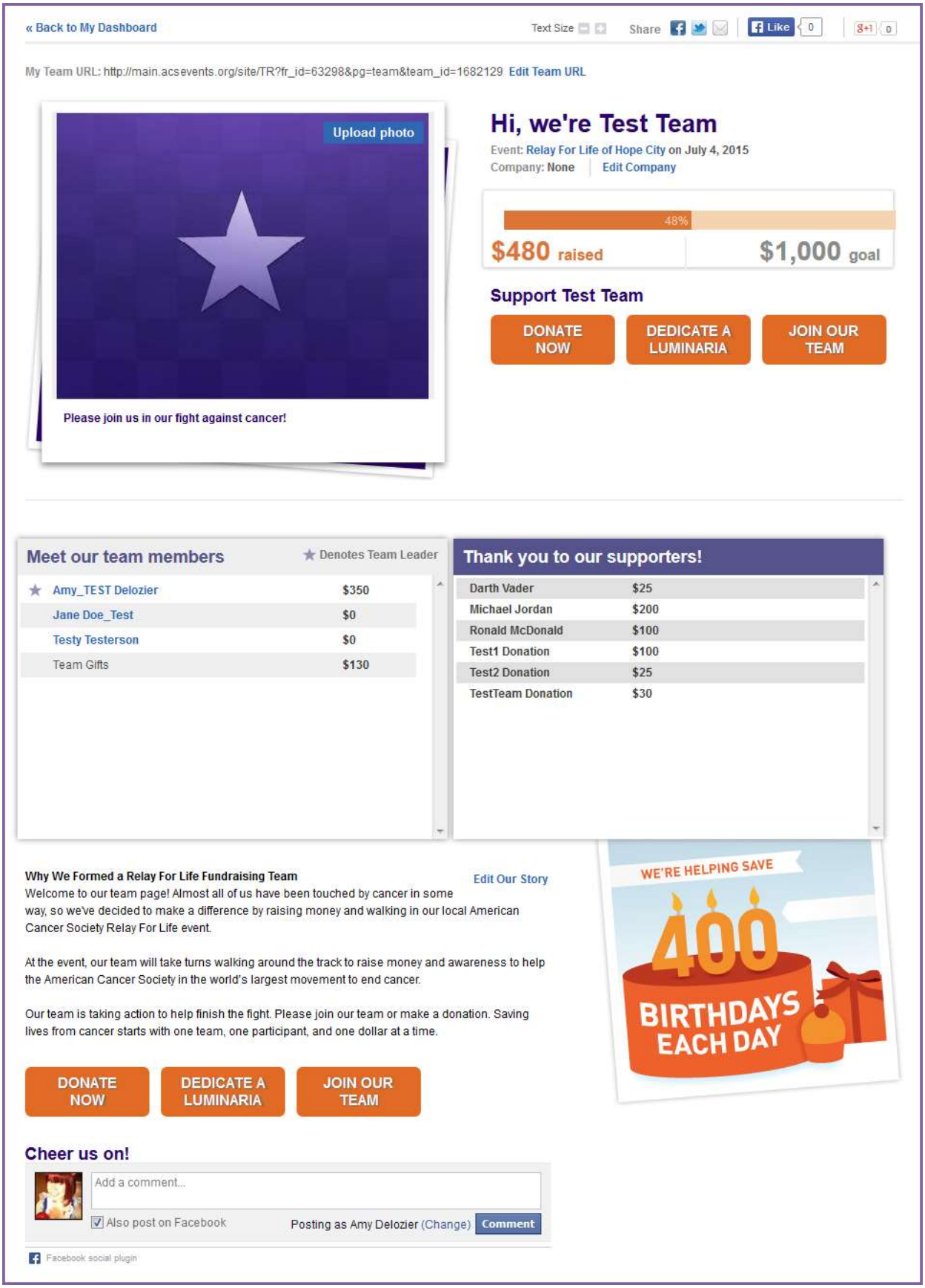
The Relay Dashboard offers team captains the opportunity to edit and update the team page. By sharing the team's reason to Relay and photos or video, you can create a compelling webpage to help you recruit teammates and donations.

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, click the **My Team Page** link in the My Team Tools box (right hand side of the page).

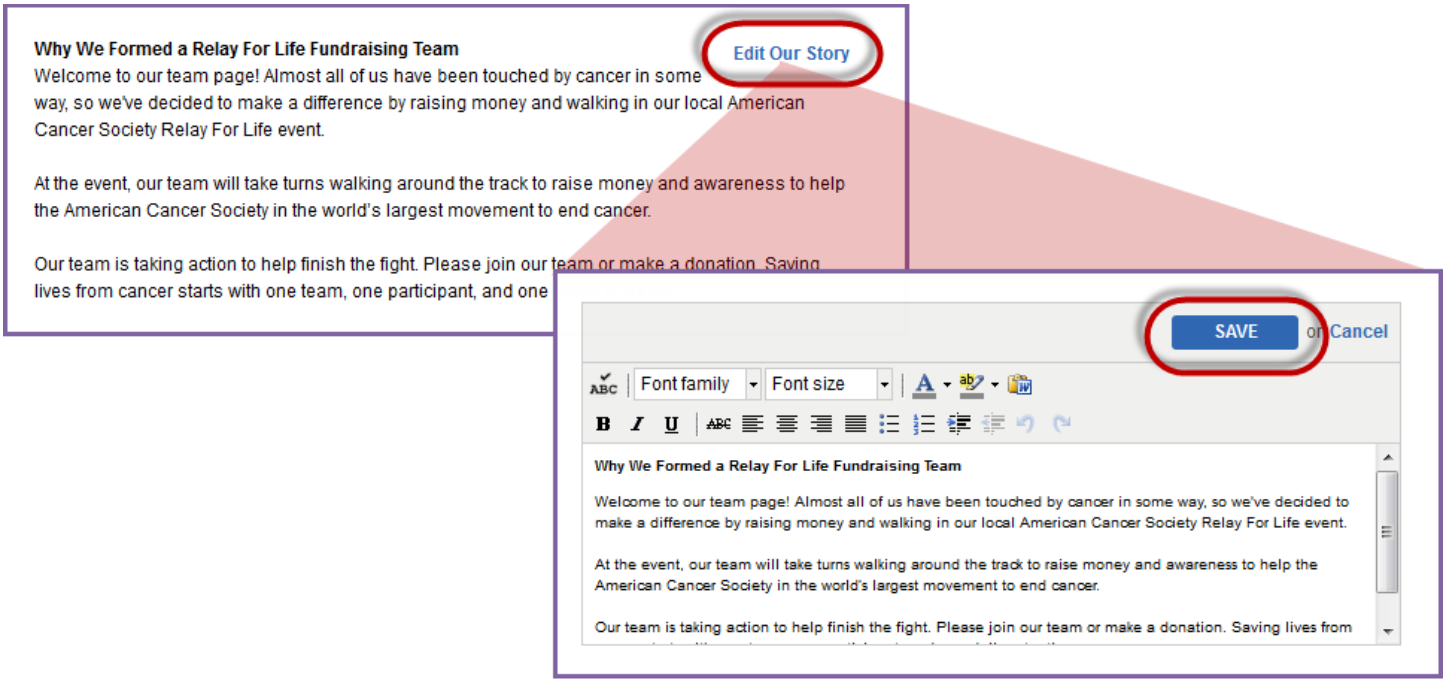


3. Your team page will appear with several links so that you may make the appropriate edits.

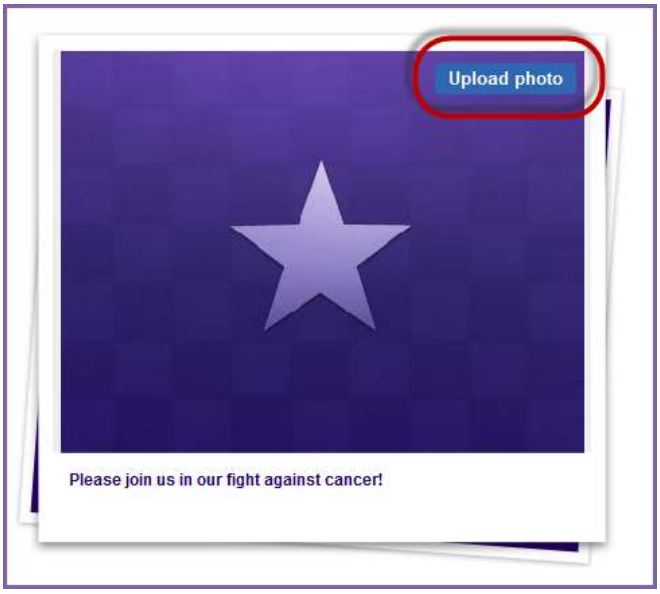


4. Edit the team's company affiliation by selecting **Edit Company** under the header of the page before clicking **Save**.

5. Edit your team's story
    a. Beside the message of the page, click **Edit Our Story**.
    b. Enter new content to your team page before clicking **Save**.
        i. You can use the toolbar to format the text in your Relay Story



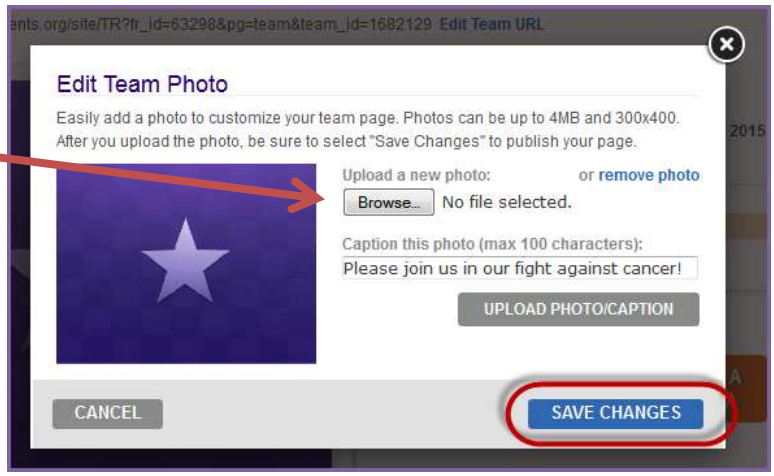
6. To add a photo to your team page click the **Upload photo** button beside the image area.



a. **Photo** – Insert one photo to display on your team page by uploading a file that contains a digital photograph. You can upload photos up to 4MB and 300x400 image size.

- *Before you upload your image file, you may want to open it in your favorite graphics application and resize or crop the image to ensure the best fit, especially if the photo is quite large. Here is an easy web-based photo resizer you can use to get your pictures down to the right size: http://www.picresize.com/*

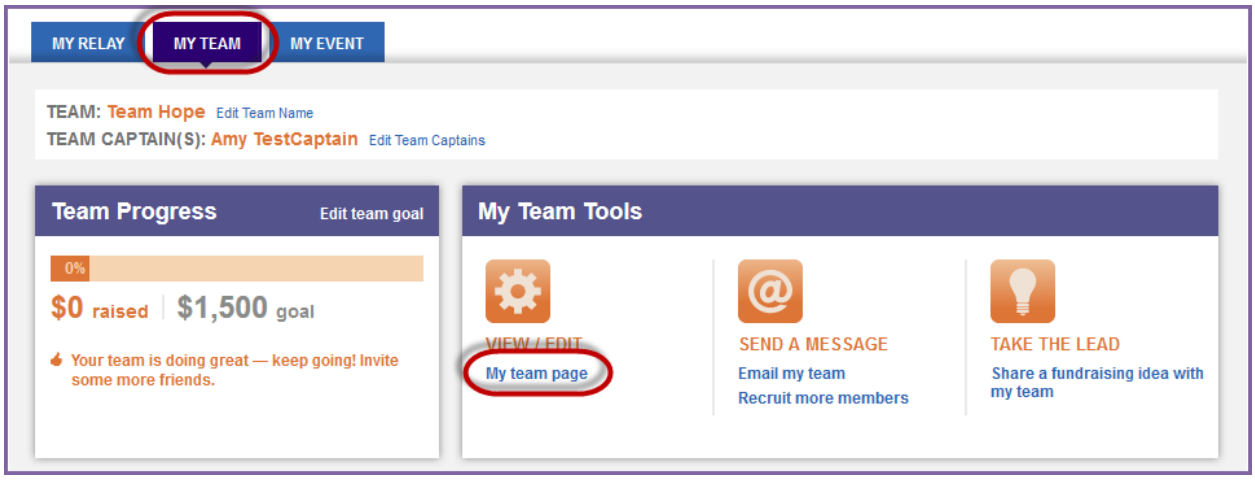
i. **Browse** – Click the browse button to find a photo located on your computer and upload to your personal page.
ii. **Caption** – Enter a caption for the photo/s you uploaded to your personal page.
iii. **Save Changes** – Click to see your new image/s reflected on the team page.



Create a Team URL

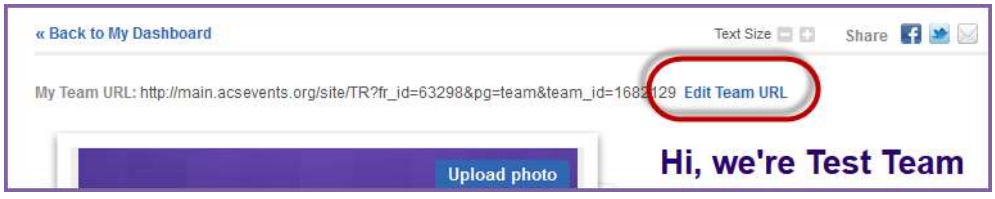
1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, click the **My Team Page** link in the My Team Tools box (right hand side of the page).

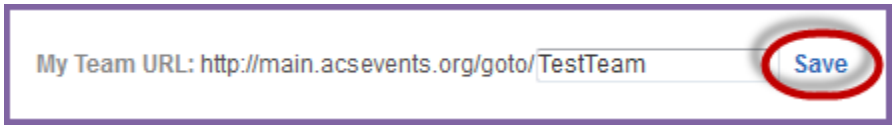


3. Your personal page will appear with several links so that you may make the appropriate edits.

4. At the top of the page, find the **My Team URL** information.



5. Click **Edit Team URL** to create a custom page URL to your team webpage. Enter in the end, personal section of the URL. Example for personal page URL: http://main.acsevents.org/goto/TeamAwesome



6. Click **Save.** Once a team URL has been created, the team captain / team members may add it to their email signature, post it on the Social Media sites, and provide a direct link for potential donors on paper materials.

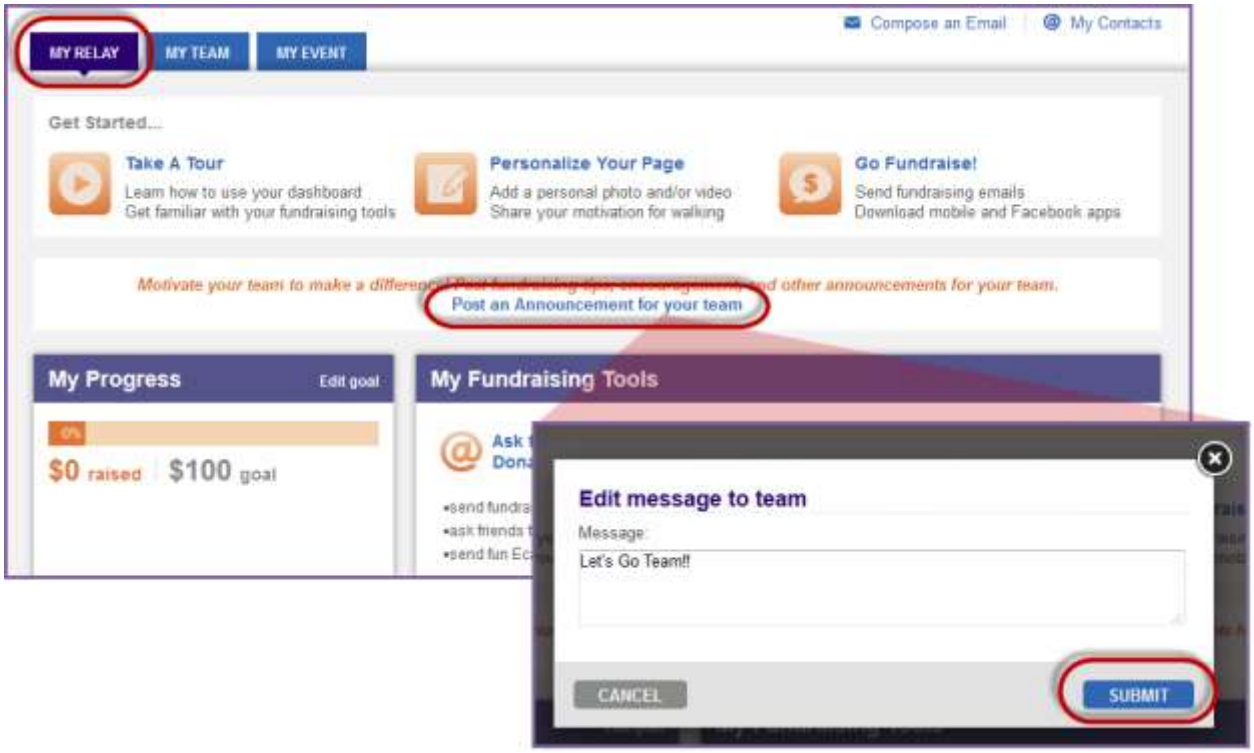
Post an Announcement for your Team in the Relay Dashboard

Keep your teammates inspired and motivated to Relay For Life by posting words of encouragement in their Relay Dashboard. The message will appear on the Relay Dashboard whenever they log into the website.

1. Using your username and password, log into your **Relay Dashboard.**

2. From the **My Relay** tab, click the **Post an announcement** link above the My Fundraising Tools box (center of the page).

3. Type the message you would like to share to inspire, motivate, or encourage your online team members. Click **Submit** to update the message.



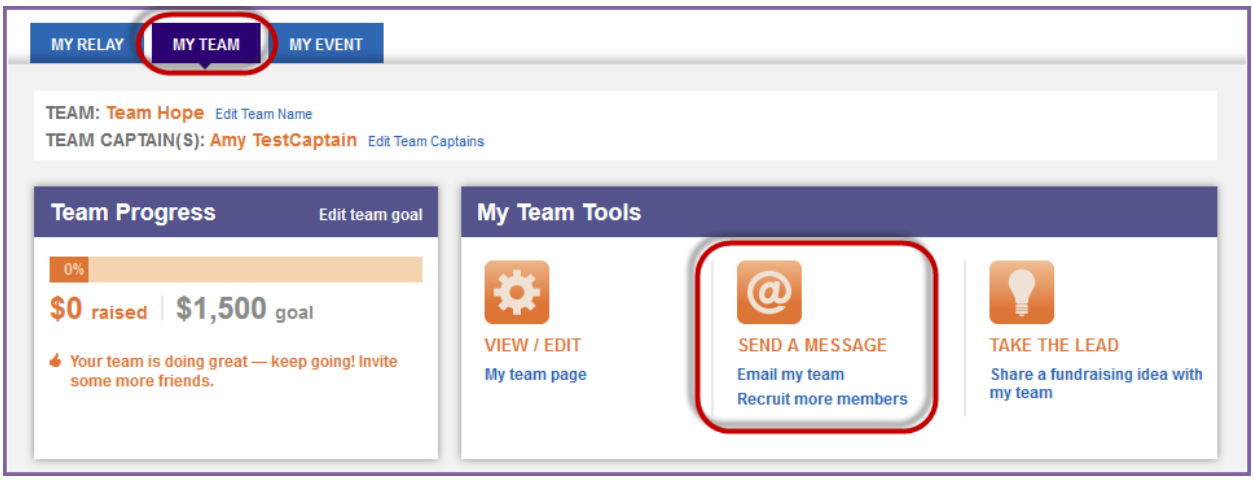
4. The message will then appear on your team members' My Relay home page.

Send an Email to Your Team Members

As an online Relay team captain, you can easily send email messages from the Relay Dashboard to your teammates. Provide encouragement, team fundraising opportunities, useful event information, and more with the click of a few buttons!

1. Using your username and password, log into your **Relay Dashboard.**

2. From the My Team tab, click the **Email my team** link in the My Team Tools box (right hand side of the page).



3. The **Send an Email** overlay will appear.
   a. Your name and your email address will automatically populate as the sender's address.
   b. Your teammates email address will auto-populate into the To: field.

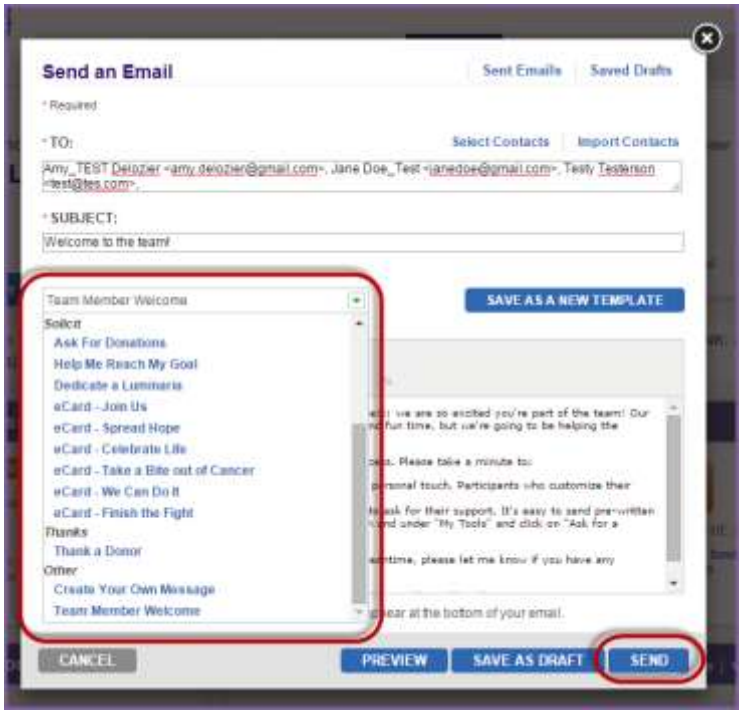
4. If you need help deciding what to write in your email, choose one of the template messages. Click on the **Select a template** drop down menu to see the suggested messages available (i.e. Team Member Welcome). Once you select the template of your choice, the email will appear for you to personalize or send as is.

5. Make any changes to the **Subject** and the **Message** text.

6. Click **Preview** to see your email message before you send it.

7. Click **Save as Draft** if you want to save this message for future use.

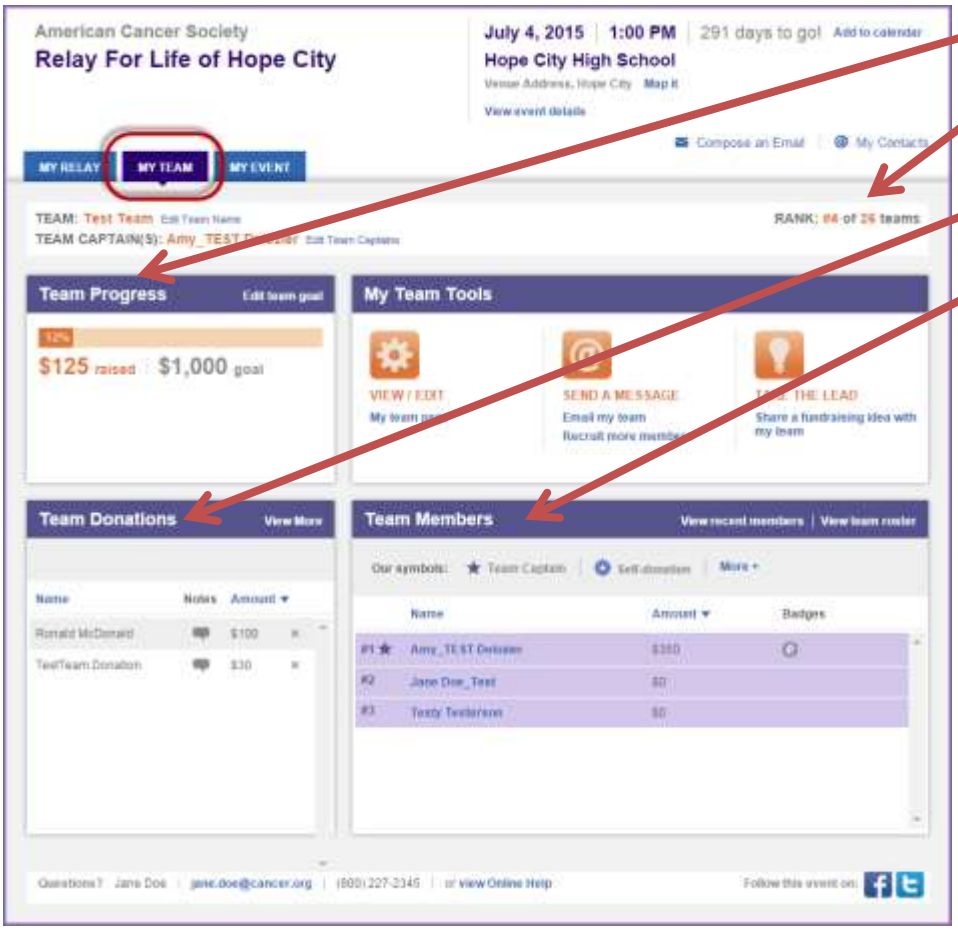
8. Click **Send** to deliver this message to your teammates. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.



View Your Team's Progress

1. Using your username and password, log into your **Relay Dashboard**.

2. From the **My Team tab**, you can:



a. Track your team fundraising progress with the **Team Progress** area.

b. See how your team ranks among the other teams participating in your Relay

c. View your **Team Donation History.**

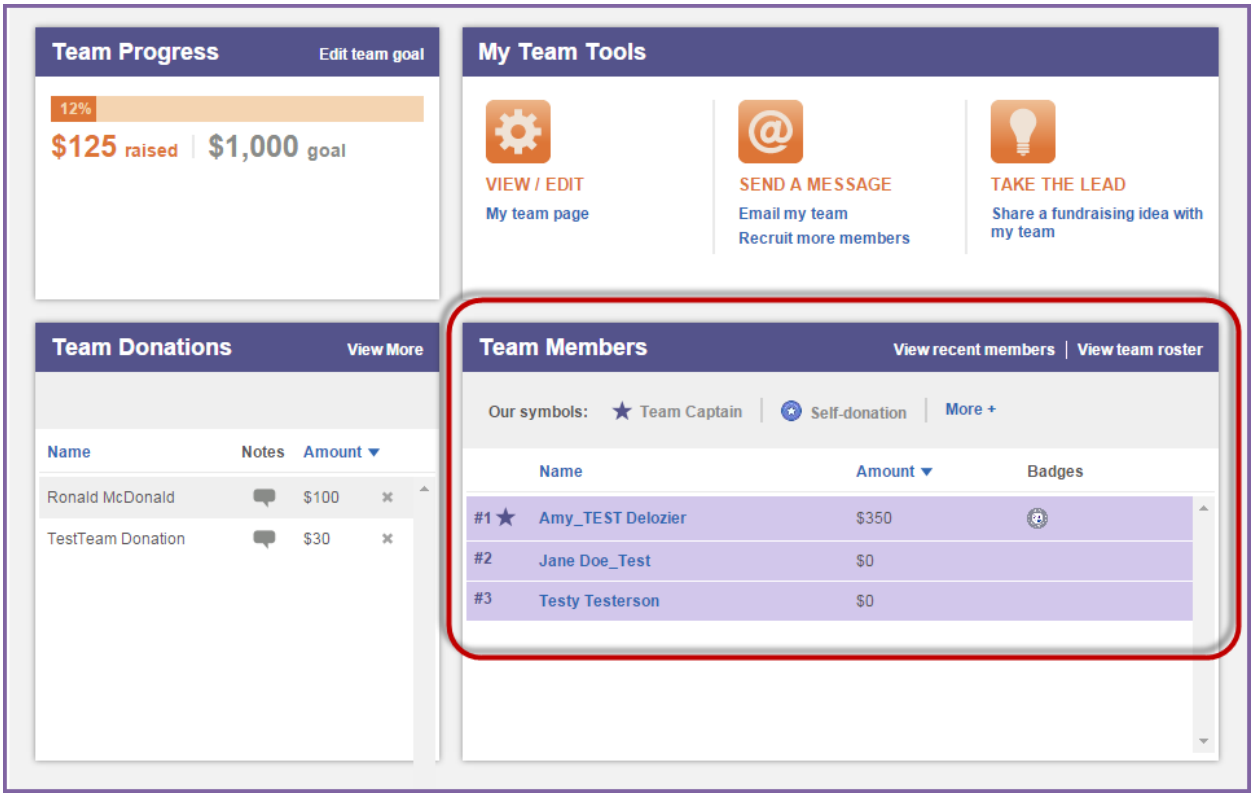
d. See a full list of team members, plus how much they've each raised

View a List of Team Members

1. Using your username and password, log into your **Relay Dashboard**.

2. From the My Team tab, locate the **Team Members** section (middle right hand side of the page).

    a. See a list of all team members plus their fundraising successes and milestone levels.
    b. View members who have recently joined your team and connect directly with the Relay Dashboard email system to send them a welcome message.
    c. Use the **View team roster** link to download a complete list of team members with additional registration information.



Chapter 9: Donate Online

- Make an Online Donation
- Print an Offline Donation Form
- Make a Luminaria Donation

Make an Online Donation

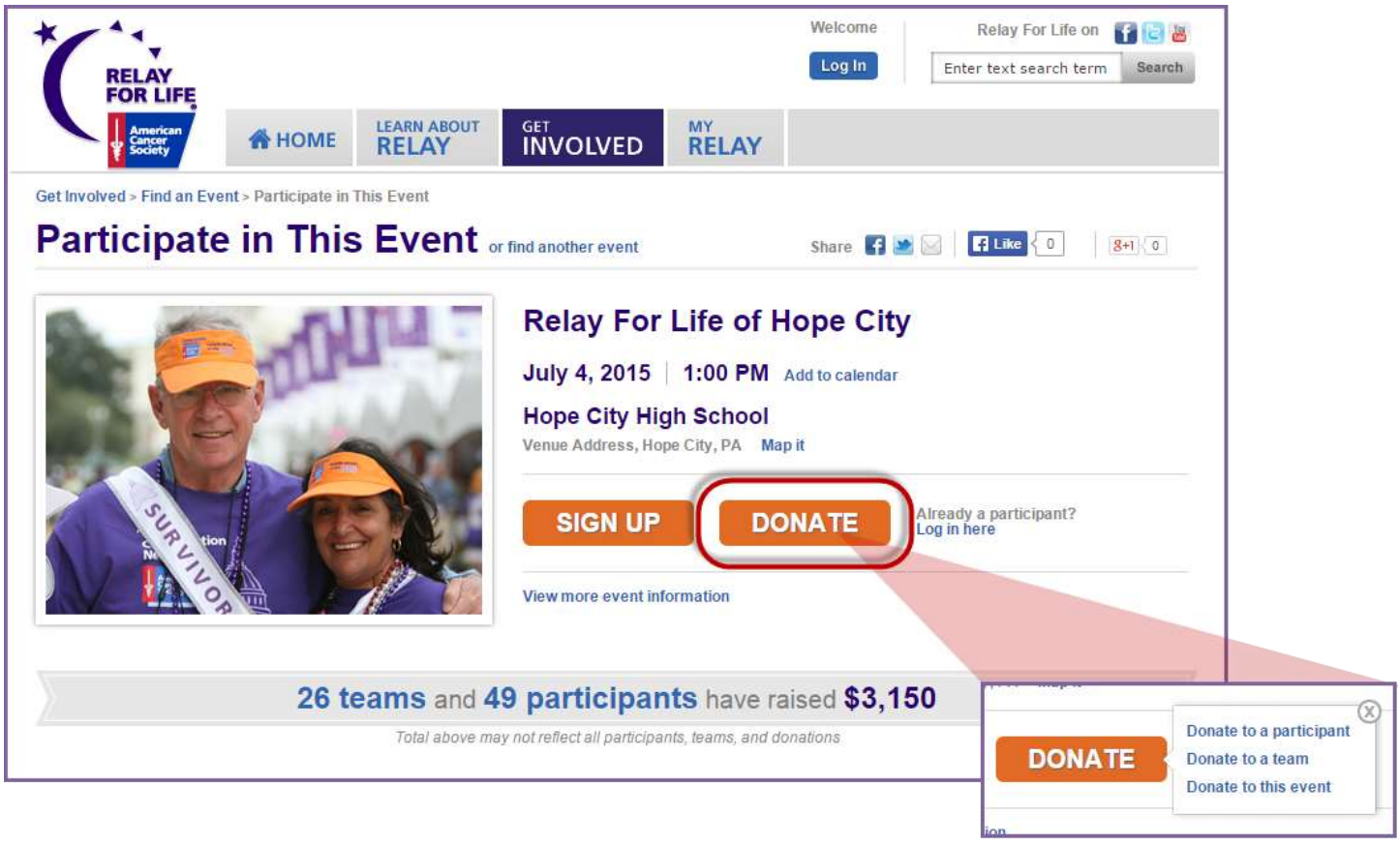
Thank you for supporting Relay For Life with an online donation. Please use the following instructions to help you complete a secure credit card donation to a participant, team, or a Relay For Life event.

Your contribution is helping to create a world with less cancer and more birthdays. Thank you!

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Click on the **Donate** link.

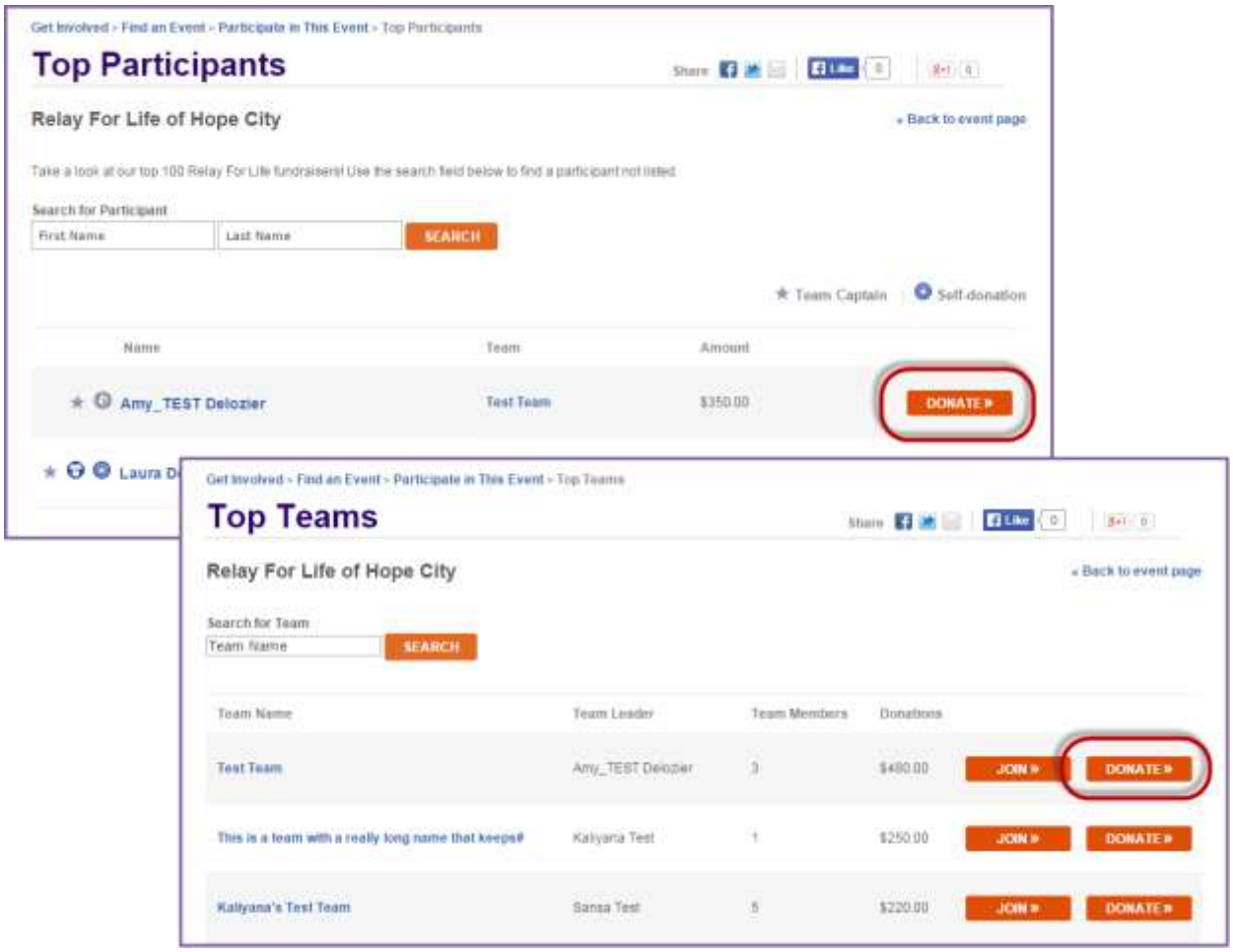
3. Upon clicking the Donate button, you can select who the donation will support: a **Team**, **Participant** or the general **Event.** Click the appropriate link.



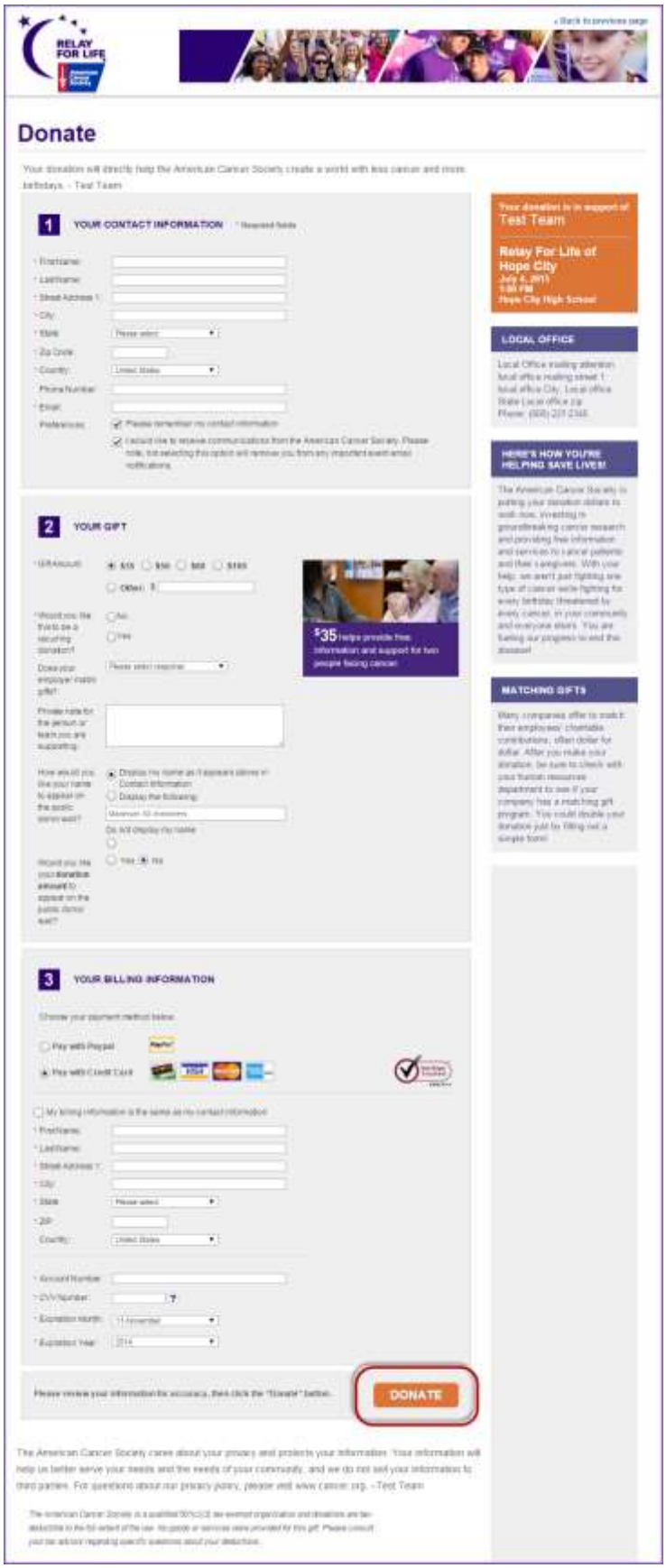
4. If selecting to make your donation to a participant or team, a listing of available online Relayers or teams will appear as your search results.

   Note: *If you select to donate to a participant, only those participants who currently have funds raised will appear in the list, however you can use the search function to locate any participants currently registered on the online website.*

   a. If necessary, use the search function to help to find who you wish to donate to.
   b. Click **Donate** beside the right participant/team.



5. After clicking **Donate** beside the team/participant, you will be directed to the donation form.
   a. If you had selected to **Donate** to the Event, you will also be directed to the donation form.
   b. Be sure to check the orange box at the top right corner of the page to ensure your donation is being credited to the appropriate participant, team and event.



6. Step 1: **YOUR CONTACT INFORMATION**
   a. Enter your **Contact Information**.
   b. Select / unselect the preferences:
      i. Please remember my contact information
      ii. I would like to receive communications from the American Cancer Society. Please note, not selecting this option will remove you from any important event email notifications.

7. Step 2: **YOUR GIFT**
   a. **Select the gift amount** or enter a specific donation amount.
   b. Identify if the donation is a **one-time gift or a recurring gift** (monthly, quarterly, etc.).
   c. Provide information, if known, about your employer's **matching gift** program.
   d. **Write a private note** to the person/team that you are supporting.
   e. Choose how you would like the gift and gift amount to be **recognized on the public donor wall.**

8. Step 3: **YOUR BILLING INFORMATION**
   a. Enter your **Billing Information** and **credit card** details.

9. Click the **Donate button** to complete the transaction.

Print an Offline Donation Form

Thank you for supporting Relay For Life with a cash or check donation.

1. From a Participant's Page, click on the link "**or mail in your donation by check**" link. An offline donation form will appear will appear for you to print out

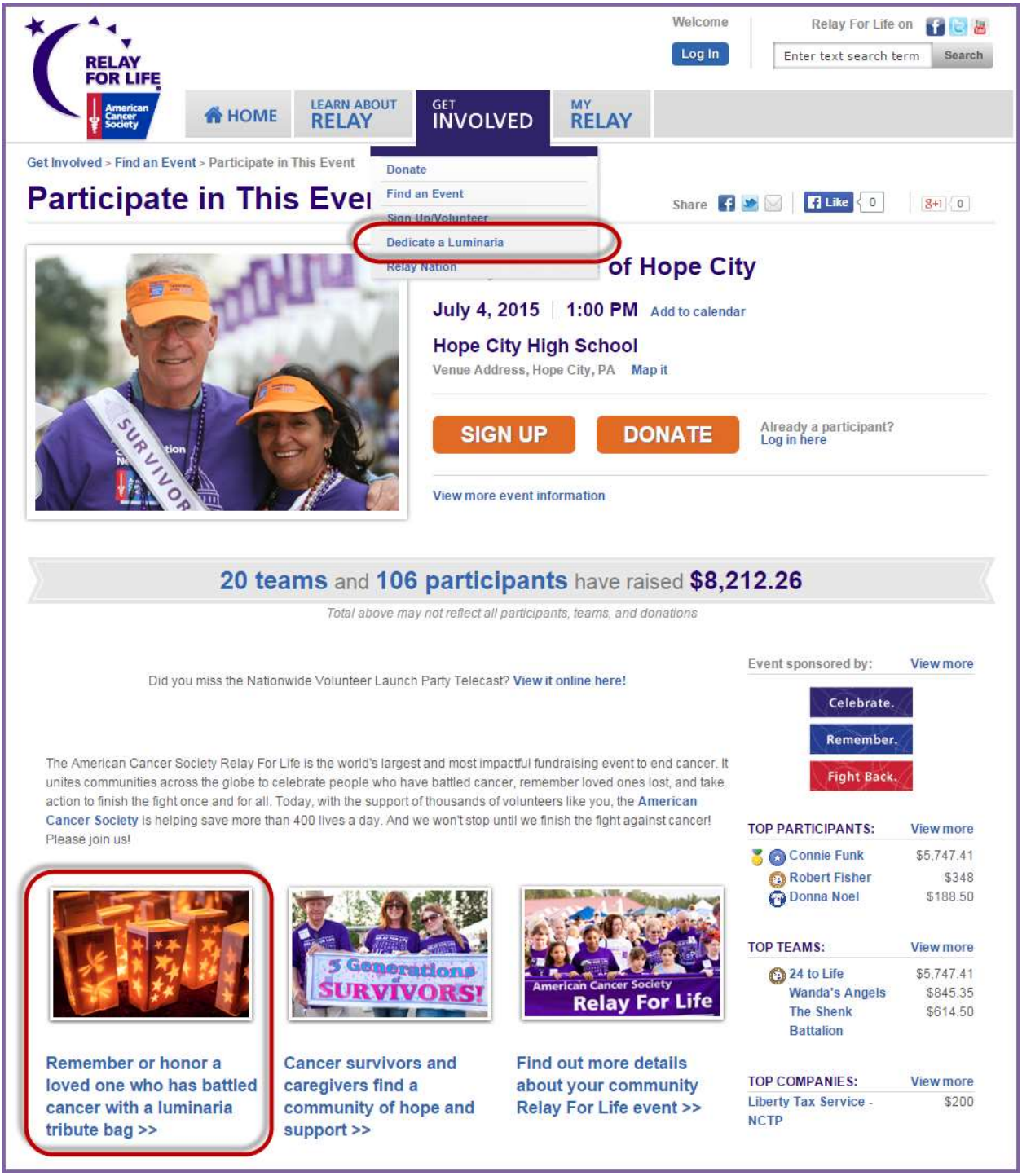
2. Complete the form and include it with your donation. Be sure to mail the form to the local American Cancer Society office listed.

3. Don't forget to send a separate email to the participant to let them know you are sending in a donation to the American Cancer Society.

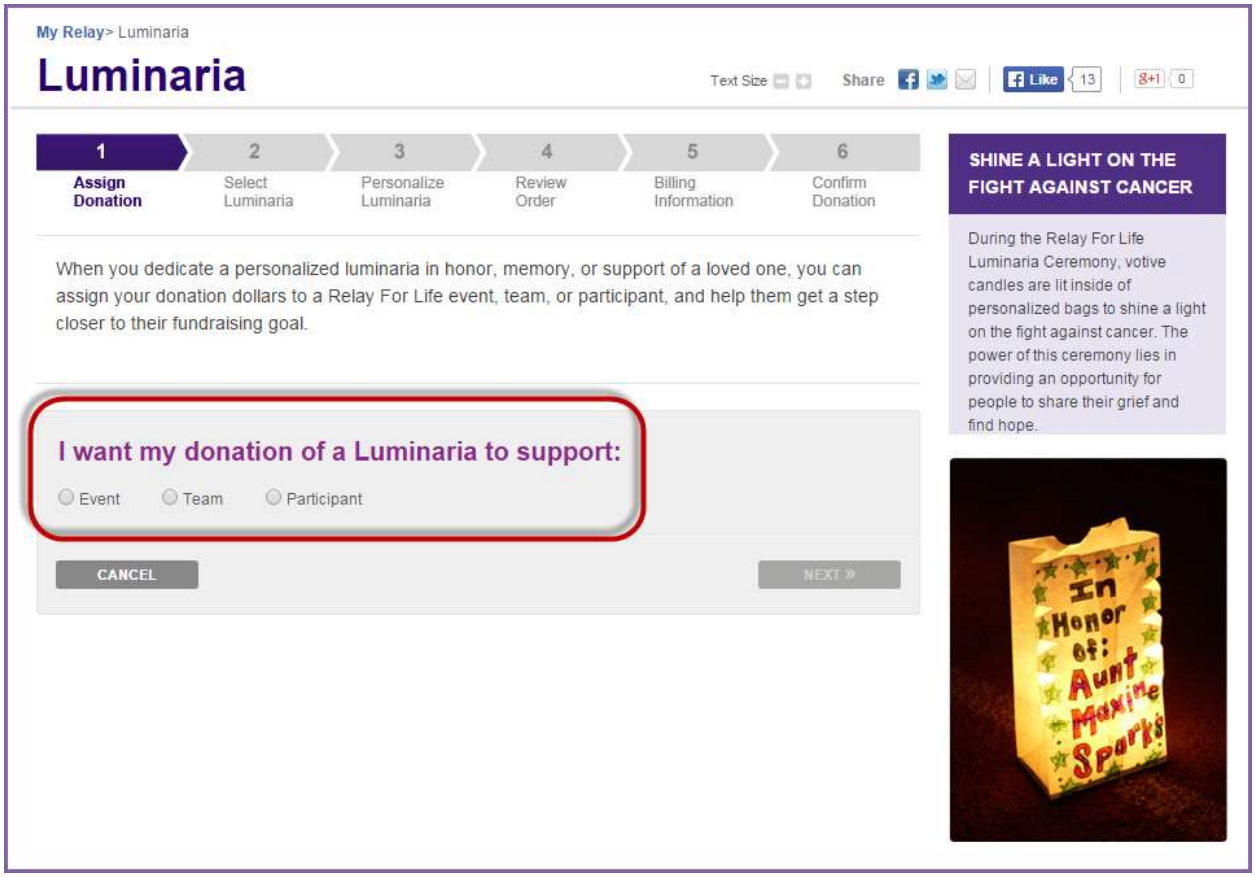
Make a Luminaria Donation

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Click on the **Dedicate a Luminaria** link on the event greeting page or select the **Dedicate a Luminaria** from the Get Involved drop down navigation bar.



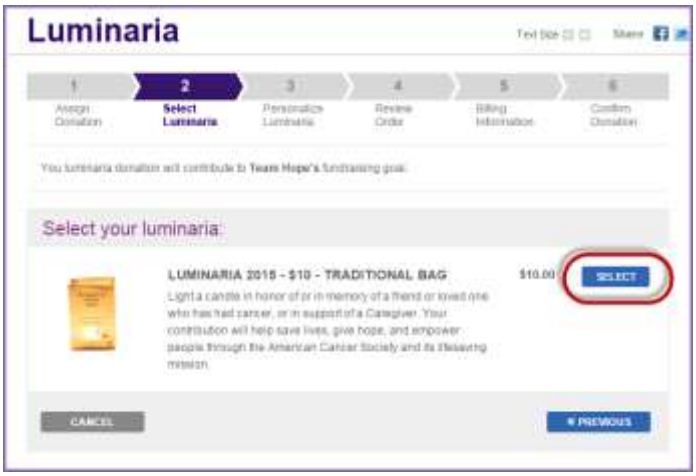
3. When the Luminaria page appears, choose if you would like to credit the luminaria donation a **Team**, **Participant** or the general **Event** by selecting the desired radial button.



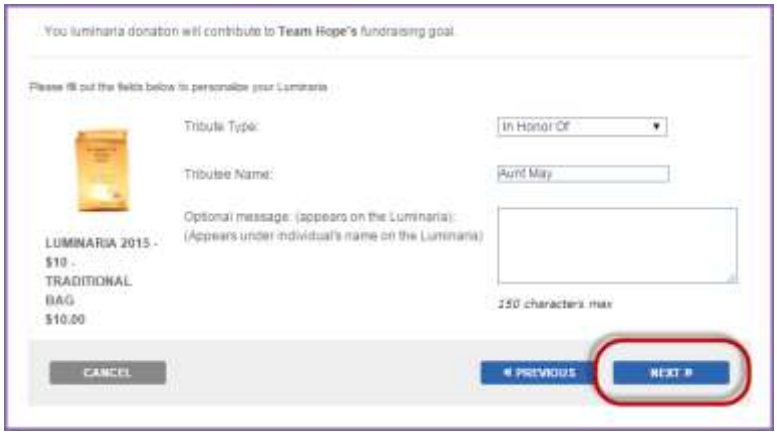
4. If donating to a team or individual, type in the individual/group information in the search field before clicking **Search**. If donating to an event, simply begin completing the donation form (skip to step 5).

a. From the search results, click **select** beside the Team/Participant you wish to make a luminaria donation to. Click **Next**.

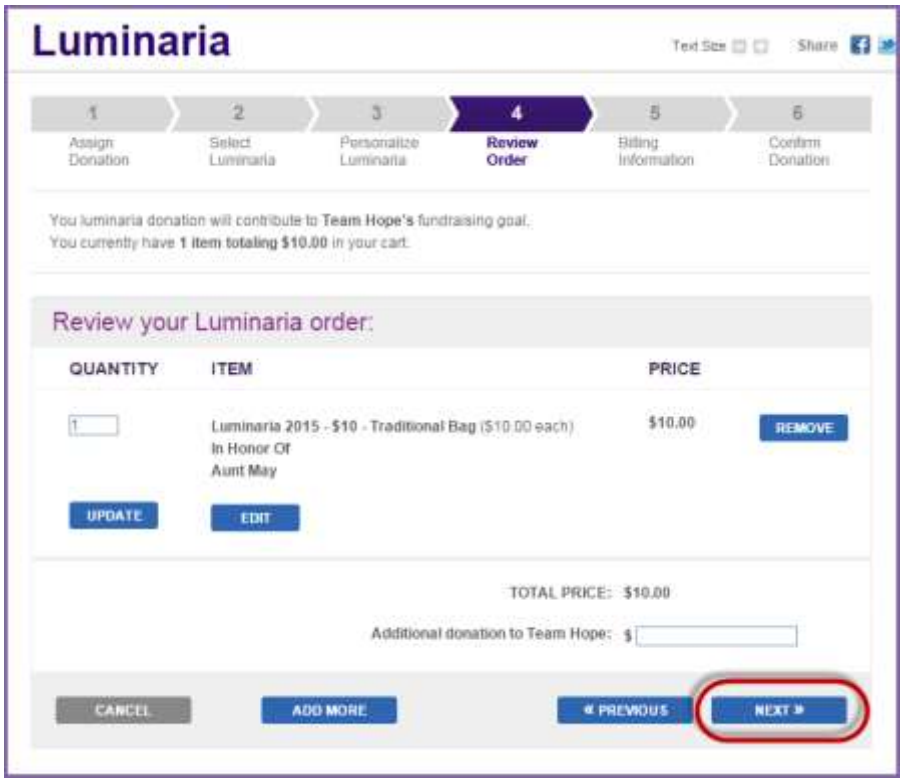
5. Identify the luminaria donation level you would like to contribute by clicking **Select** next to the desired option.



6. Personalize the luminaria bag:
   a. Add **In Honor** or **In Memory.**
   b. Provide the **name** and (optional) **message** to be displayed on the luminaria.
   c. 'Click **Next**.



7. Review your donation
    a. Select **Edit** to make changes to the luminaria personalization.
    b. Delete the luminaria from your gift order by choosing **Remove**.
    c. Add an additional donation to the donation process by typing in a value in the **Additional Donation** field.
    d. The **Add More** link will allow you to light another luminaria.
    e. When done reviewing the donation, click **Next**.



8. Enter your **Billing Information** and **credit card** details before clicking Next.

9. Provide a final confirmation of your luminaria donation before clicking **Submit**.

1

Chapter 1: Access to the Event Management Center

- Access the Event Management Center
- Trouble accessing your Event Management Center? Try these steps.

As your community's Relay For Life Online Chair, you have access to the Event Manager Center – or back end – of the fundraising website. From the Event Management Center, you may provide technical support and leadership for your Relay, including the ability to edit basic event information, customize the webpages, send emails to past and current participants, provide customer service, and report on online success.

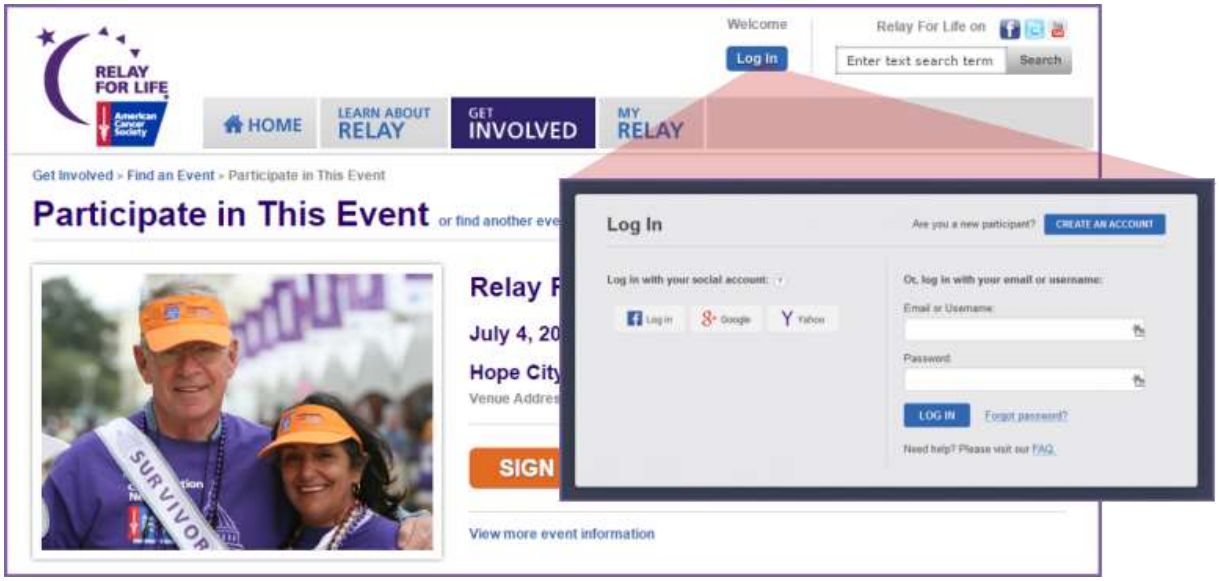
Access the Event Management Center

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

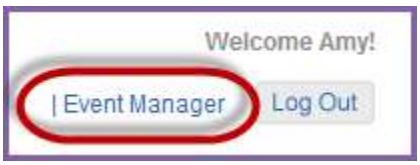
   We recommend you add your Relay event's web address to your favorites or bookmark to easily access it.

2. At the top of the page, click the blue Log In button. In the window that opens, enter your username and password. ***Note:*** *It will be the same for all events you manage*

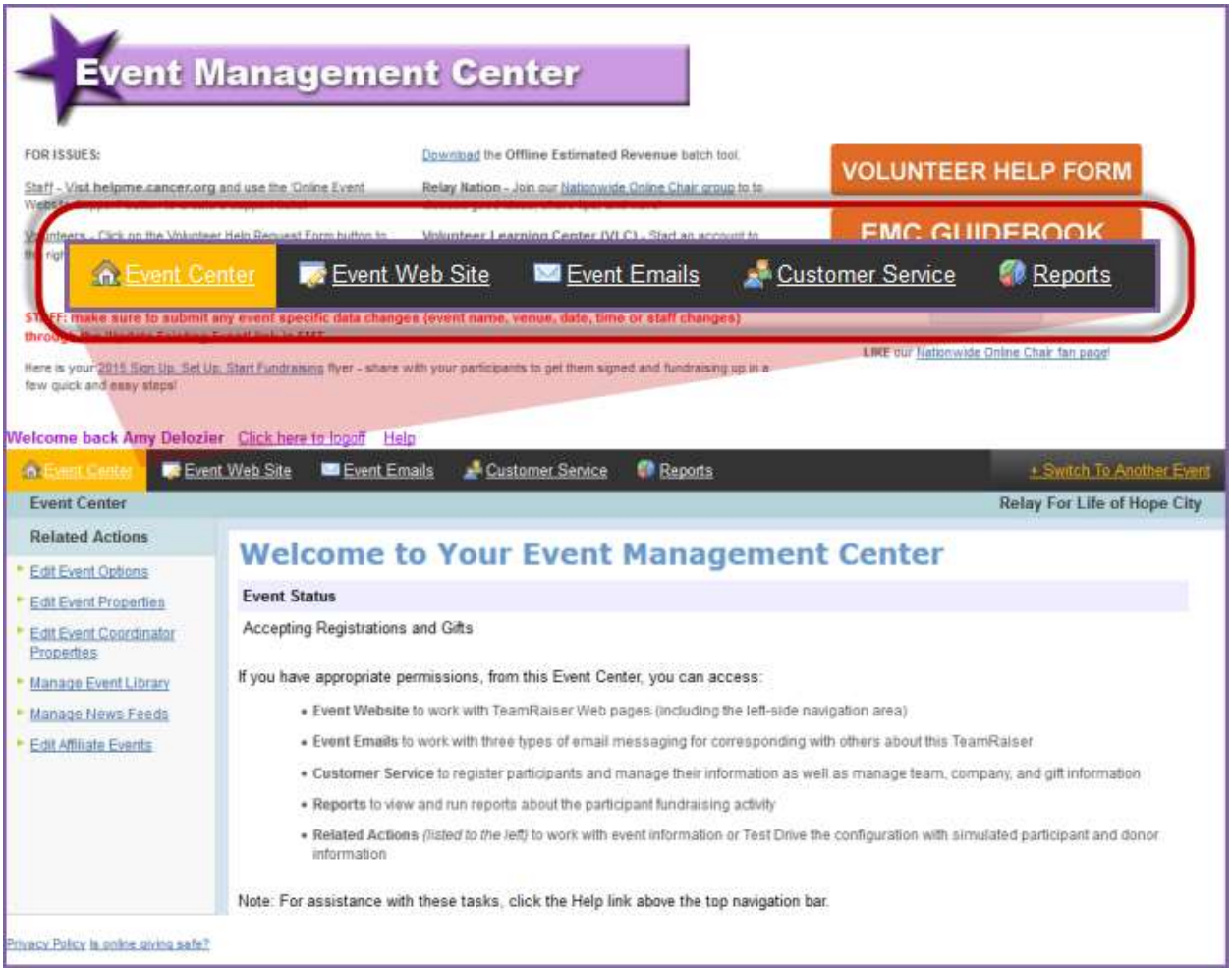
   a. **Existing Staff/Volunteers:** Your username/password will be the same as it was for 2014.
   b. **New Staff/Volunteers:** See Appendix A for EMC access instructions.



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

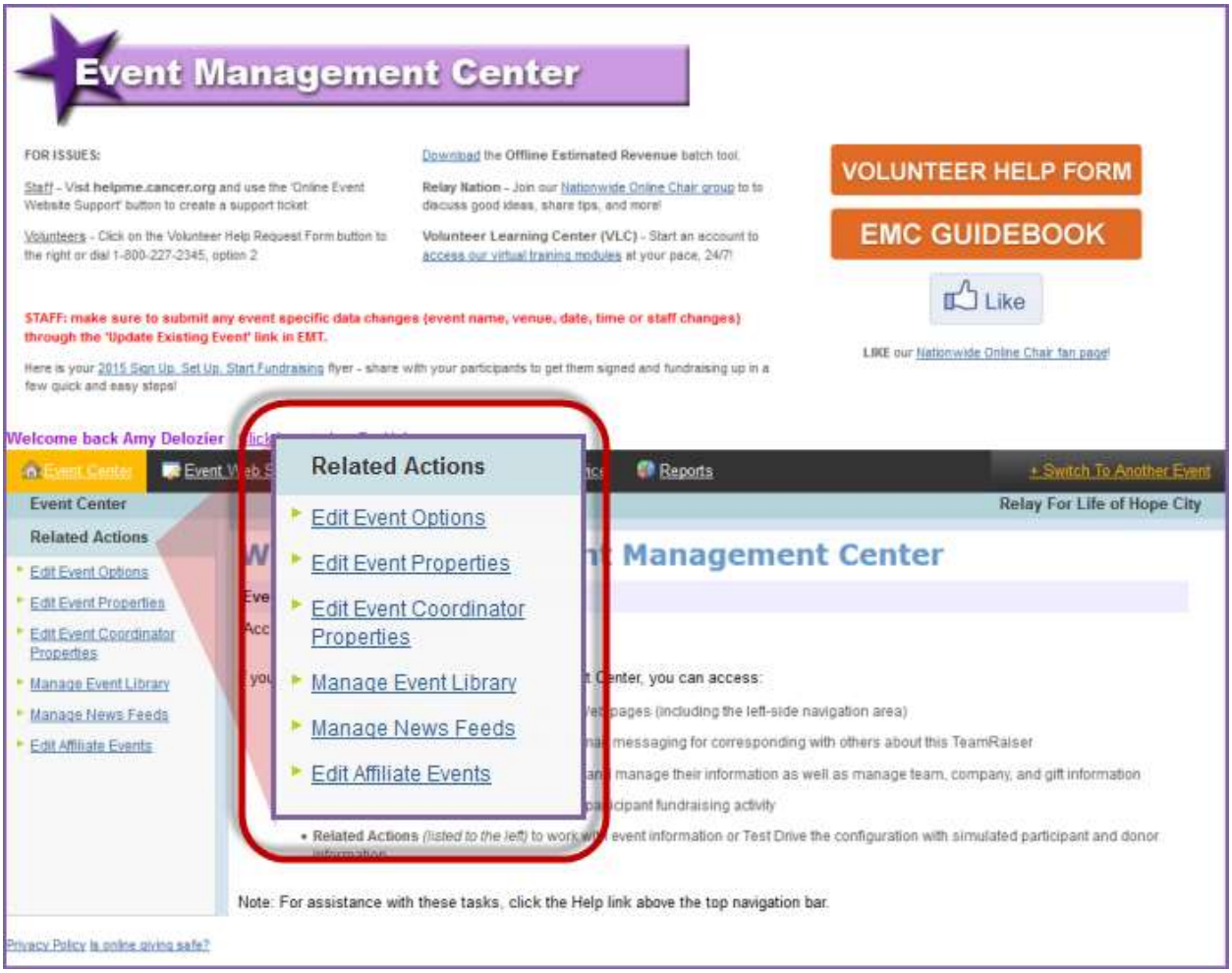


4. The Event Manager Center (EMC), or the back-end of the site, will appear. The Event Manager Center is divided into five sections:



   a. **Event Center**: In this section, you will be able to set up many of the basic customizations of your website, like the event date and social media links.
   b. **Event Website**: Within Event Website, you will have the opportunity to make local updates to webpages and create new webpages for your event.
   c. **Event Emails**: All emails to past participants and current Relayers will come from the Event Emails section.
   d. **Customer Service**: From this section, you may help support registered participants and donors with online questions.
   e. **Reports**: There are a number of reports created for your event. You may pull the data from those reports to track your online success.

5. On the left side are Related Actions associated within the particular tab you are working in. (see next page for screen shot)


Event Management Center
FOR ISSUES:
Staff - Visit helpme.cancer.org and use the 'Online Event Website Support' button to create a support ticket
Volunteers - Click on the Volunteer Help Request Form button to the right or dial 1-800-227-2345, option 2
Download the Offline Estimated Revenue batch tool.
Relay Nation - Join our Nationwide Online Chair group to to discuss good ideas, share tips, and more!
Volunteer Learning Center (VLC) - Start an account to access our virtual training modules at your pace, 24/7!
VOLUNTEER HELP FORM
EMC GUIDEBOOK
Like
LIKE our Nationwide Online Chair fan page!
STAFF: make sure to submit any event specific data changes (event name, venue, date, time or staff changes) through the 'Update Existing Event' link in EMT.
Here is your 2015 Sign Up, Set Up, Start Fundraising flyer - share with your participants to get them signed and fundraising up in a few quick and easy steps!
Welcome back Amy Delozier
Event Center
Reports
+ Switch To Another Event
Relay For Life of Hope City
Related Actions
Edit Event Options
Edit Event Properties
Edit Event Coordinator Properties
Manage Event Library
Manage News Feeds
Edit Affiliate Events
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.
Privacy Policy Is online giving safe?

Trouble accessing your Event Management Center? Try these steps.

Clear your Browser's Cache
Most browsers have what we call "caching issues," which basically means your computer is remembering something you don't want it to. This is common when you frequently use the back button on a site, and can also happen to if you're using a shared computer. To clear your cache, follow the instructions below based on which browser you're using:

FireFox:

- Go to 'Tools'
- Click 'Options'
- Go to the 'Privacy' tab
- In the center of the page, click the 'Clear your recent history' link
- Go to the 'Advanced' tab, and click on "Network"
- Under "Offline Storage", click 'Clear now"
- Click OK.

Internet Explorer:

- Go to 'Tools'
- Click 'Internet Options'
- In the General tab, click "Delete" under the 'Browsing history' section
- Check all desired options, then click 'Delete'
- Click OK.

Google Chrome:

- From the menu, select 'Tools'
- Select Clear browsing data
- In the dialog that appears, select the checkboxes for the types of information that you want to remove
- Use the menu at the top to select the amount of data that you want to delete. Select beginning of time to delete everything
- Click Clear browsing data

Please note that clearing your cache may take several minutes, during which time your computer may appear to freeze or the browser may appear to stop responding/lock up. Please be patient and allow this process to finish. If you continue to experience problems after clearing your cache, completely quit the browser (close all open windows, regardless of what site is open in that window), then reopen the browser. This will clear session data, which can also cause caching issues.

Note: *If this is your first time logging in since November 2014, you may also need to migrate your record to the new Society Account. Lean more about the new Society Account in Chapter 1. If you need additional assistance creating or accessing your new Society Account, feel free to call our web site support desk at 877-957-7848. We're always ready to assist you with any question you might have.*

Chapter 2: Event Manager Center – Event Center Customization

- Event Customization
- Edit Event Information
    - Edit Event Options
    - Add Event Properties
    - Edit Event Coordinator Properties
- Manage Event Library
- Manage Newsfeeds

Event Customization

Your Relay For Life website is a frequently visited resource that teams, participants, survivors, and community members will visit to learn more about your event. Please take the time to update your event specific information as necessary, including event date, location, and contact information.

As you are completing the customization process, if you find that any event details are incorrect, you will need to *work with your ACS staff partner*, who will follow the formal process to submit the changes so they can be made in all databases.

ACS Staff: We have a new nationally centralized process for submitting various types of event requests, which allows us to update all databases as appropriate. The new process for submitting these types of requests can be accessed through EMT.

1. Log into EMT
2. Scroll down to the 'Resources' section
3. Click the Update an existing event link
4. This link will take you to the Event Change Request Form
5. Complete and submit this form. Please fill out all required fields, and be very specific about the change(s) you are requesting.

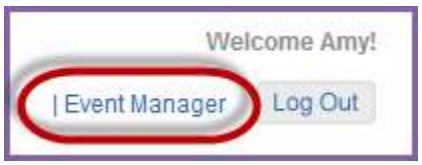
See Appendix B for more information on submitting different event change requests.

Edit Event Information

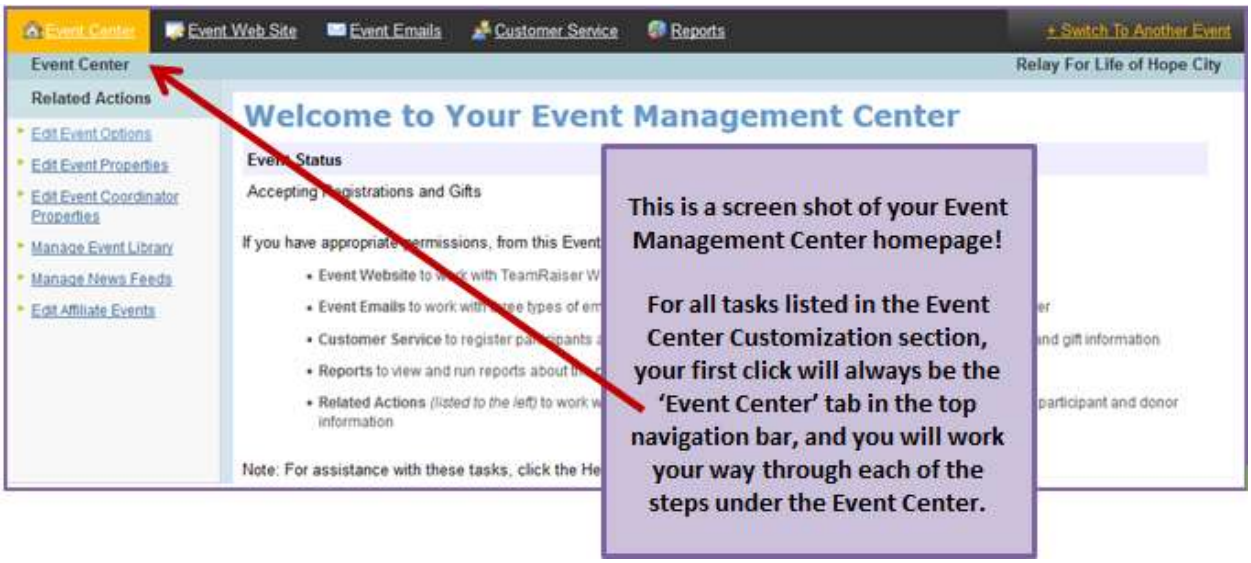
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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



4. From the Event Management Center, click **Event Center** in the top Navigation Bar.



Edit Event Options

1. From the Event Management Center, click **Event Center** in the top Navigation Bar.

2. Under Related Actions (left hand side of the page), click **Edit Event Options**.

3. You can work your way through the following 'Event Center' details making updates where necessary.

A. Edit Event Options

1. Different Event Fundraising Goal: Verify your event goal, update if necessary.
2. Click **Next**

B. Edit Advanced Options

a. New Team Notification (Optional): Enter your email address if you wish to be notified whenever a new team registers for your event. This is a great way to engage new team captains by sending a welcome email!

b. Sponsor Image Relative Path (Optional): You can update field with your Scrolling Sponsor Logo file, and it will appear in the Sponsors box on your Greeting Page. See Appendix C for the steps for creating a scrolling sponsor logo file.

c. Click **Next**

C. Edit eCommerce Options

1. eCommerce Store Associated With the Event Products: Your event has been defaulted to National Luminaria Store which offers the Traditional Bag for $10. If you wish to offer different products, please log a ticket at http://helpme.cancer.org with a list of the names and prices of the products you wish to offer.
2. Content Entered By Event Manager about the Products or Store (Optional): Enter custom content regarding your Event's Luminaria Ceremony, if desired. Content entered here will appear on the luminaria page.
3. Click **Next**

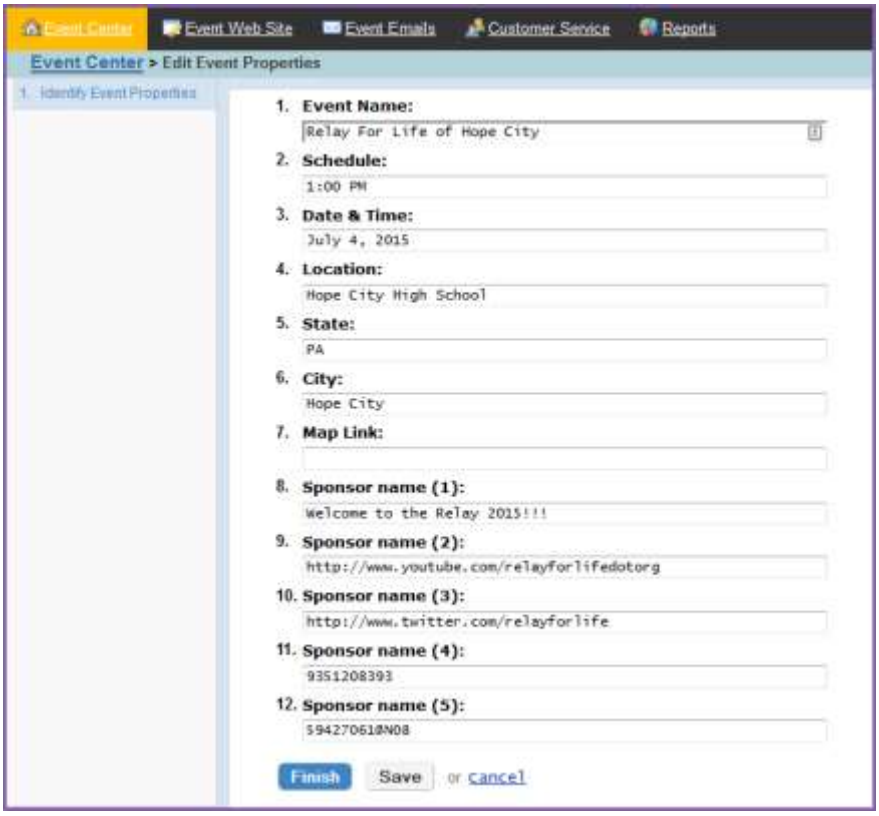
D. Edit Event Status

1. **Do not change the status of your event at this time.** Your site will be automatically be set to "Accepting Registrations & Donations"
    i. The day before your event, you may want to log back in and set your status to "Accepting Gifts Only" to turn off online registration. This will allow you to pull a final registration report, and prevent any last minute, unaccounted for registrations.
2. Click **Finish**

Edit Event Properties

1. From the Event Management Center, click **Event Center** in the top Navigation Bar.

2. Under Related Actions (left hand side of the page), click **Edit Event Properties**.



    1. **Event Name:** Verify the Event Name is correct. If it is not correct, please see Appendix B for the steps to submit the Event Name Change so it can be updated in all systems.
    2. **Schedule:** Verify the Event Start Time
    3. **Date & Time:** Verify the Event Date. If it is not correct, please see Appendix B for the steps to submit the Event Date Change so it can be updated in all systems.
    4. **Sponsor name (1):** Please remove the default content and replace with an Event Announcement. Text entered here will appear on the My Event tab in dashboard. Example Announcement: 'Welcome to Relay For Life!' or announce an upcoming meeting or fundraiser.
    5. **Sponsor name (2):** Official RelayForLife.org YouTube Channel. Please leave as is.
    6. **Sponsor name (3):** Twitter feed. This is defaulted to the national Twitter page. If your event has a Twitter feed, please enter the web address of your twitter feed. Must remain in "https://twitter.com/..." format.
    7. **Sponsor name (4):** Facebook feed. This is defaulted to the national Facebook page. If your event has a page on Facebook, enter the Facebook ID to enable the Facebook News Feed on the Contact Us page of your site.
        i. To find your Facebook ID, simply plug the URL into http://findmyfacebookid.com/.
        ii. ***Note:*** *if you update, it must be a valid Facebook PAGE ID, not group or profile. If your event does not have a Facebook page, please leave the existing ID as is.*

8. **Sponsor name (5):** This is defaulted to the national Flickr account. If your event has a page on Flickr, enter the page ID to enable your Flickr photo gallery populating to the EVENT PHOTOS section on your website. If your event does not have a Flickr page, please leave the existing ID as is.
9. ***Note**: Sponsor lines 1-5 can be updated at any point throughout the year if your event decides to start a new social media feed.* Please make sure you are keeping the announcement in Sponsor name (1) updated and relevant throughout the Relay season.
10. Click **Finish**

Edit Event Coordinator Properties

1. From the Event Management Center, click **Event Center** in the top Navigation Bar.

2. Under Related Actions (left hand side of the page), click **Edit Event Coordinator Properties**.

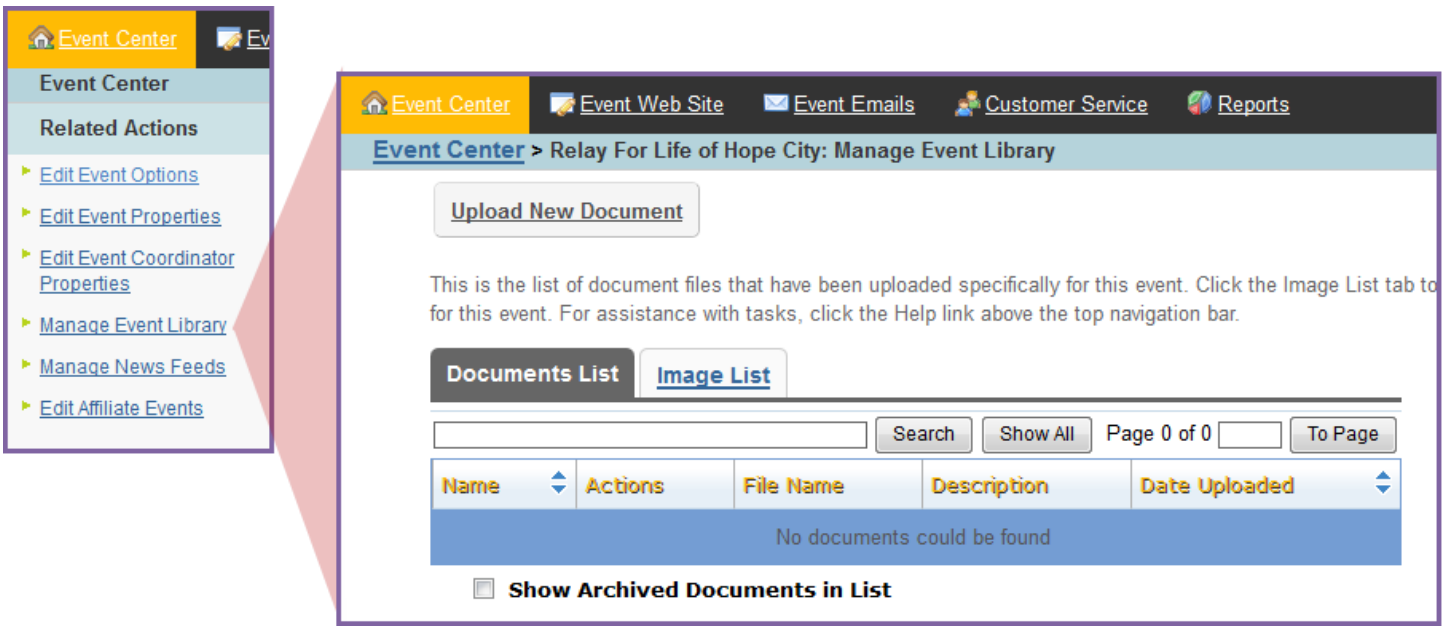
    1. Name: Verify ACS Staff Person name.
    2. Phone: Verify ACS Staff Person phone
    3. Email: Verify ACS Staff person cancer.org email
        i. If the ACS Staff Partner information is not correct, please see Appendix B for the steps to submit the Event Coordinator Change so it can be updated in all systems.
    4. Click **Finish**

Manage Event Library

All documents and images that you wish to post online or in an email must be housed within the Event Manager Center library. By managing the library, you can review images/documents already uploaded, upload additional files, or create new version of files. See Chapter 3 for more information on managing the event library.

1. From the Event Management Center, click **Event Center** in the top Navigation Bar.

2. Under Related Actions (left hand side of the page), click **Manage Event Library**.



3. You can upload Documents and Images here for use in the Event Web Site and Event Emails area. See next chapter for details on how to upload and use Documents and Images.

Manage News Feeds

News updates may be prominently displayed in the My Relay tab of the participant's Relay Dashboard.

This is a perfect opportunity to list announcements such as meeting and deadline dates, online fundraising challenges, and special Relay activities. National and state wide new announcements may also be placed in this area.

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

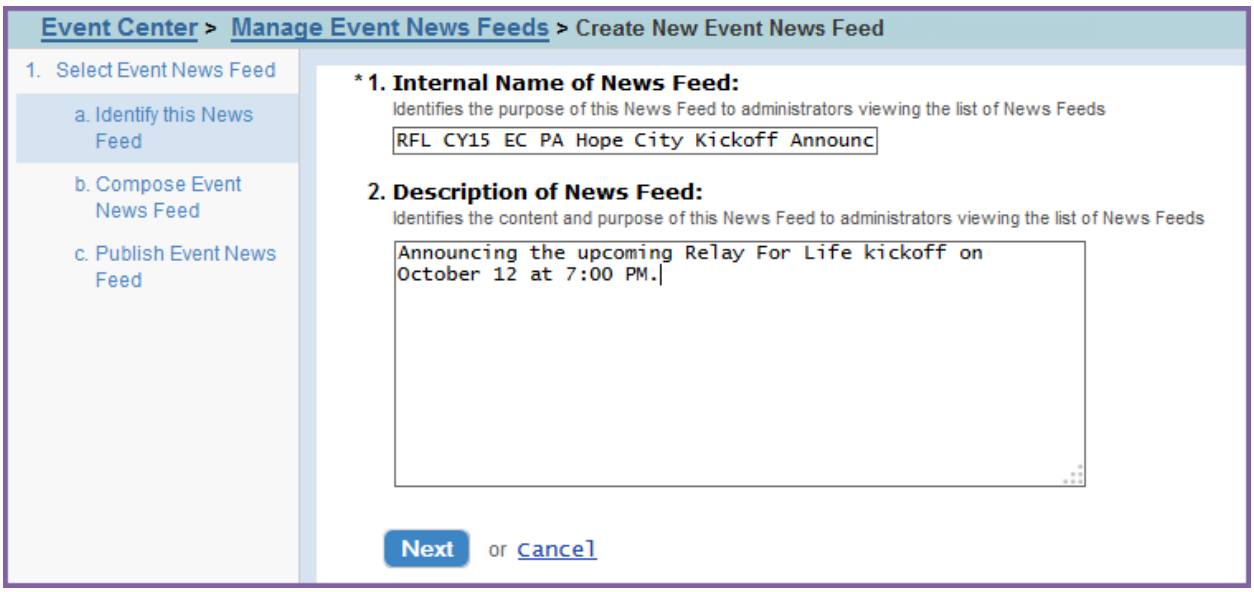
2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

4. From the Event Management Center, click **Event Center** in the top Navigation Bar, and under Related Actions select **Manage News Feeds**.

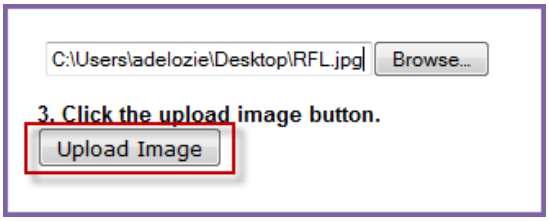
5. To create a new news feed announcement, click the **PC2 Event News Feeds** tab, then click **Create New Event News Feed**.

6. Start by providing an **Internal Name** and **Description** for the news feed. This will not be seen by the public, but will help you identify each news feed the Event Manager Center. Click **Next**.
    a. You should be very specific when creating the Internal Name for your news feed, since all local event news feeds roll up into a national list. Adding your event name to the new feed name will help identify it within the national list should you ever have any questions or require support for your news feed.

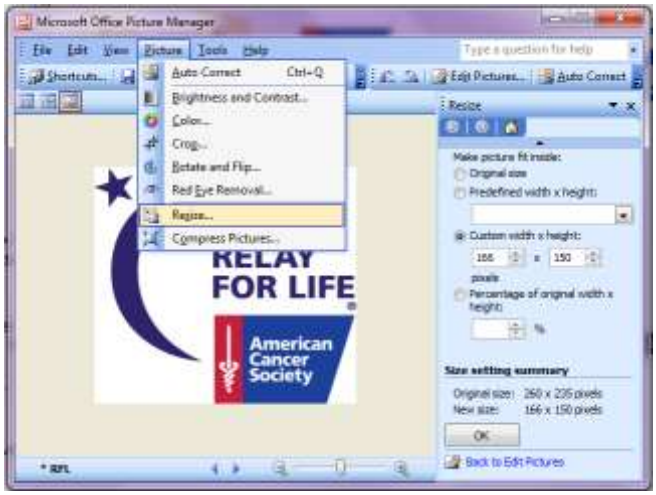


7. The next step of the process is to compose the Event News feed.

   a. **Add a photo to your news feed!**
   Before uploading your photo, you may need to resize your image. The maximum size allowed is **200 pixels wide by 150 pixels tall.**



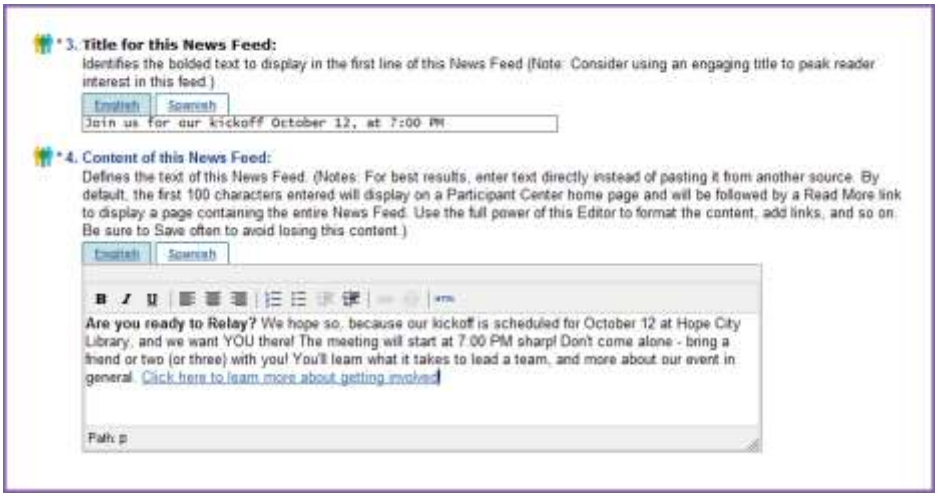
   Simply browse for the saved image. Select it, and then Upload!



   b. You can skip 2. Alt Text Label for the Image, it is not required, unless you want to add a short description of the image to display when someone hovers their cursor over the photo

   c. ***Add a title to your news feed!** This is a required step, and the title of your news feed will display to the public through their My Relay Dashboard.

   d. ***Add content to your news feed!** This is a required step, and the content of your news feed will display to the public through their My Relay Dashboard.
      i. By default, only the first 100 characters entered will display on in the Announcements section of the dashboard, and will be followed by a Read More link to display a page containing the entire News Feed… So make those first 100 characters count! You can even create hyperlinks to other pages within your website!



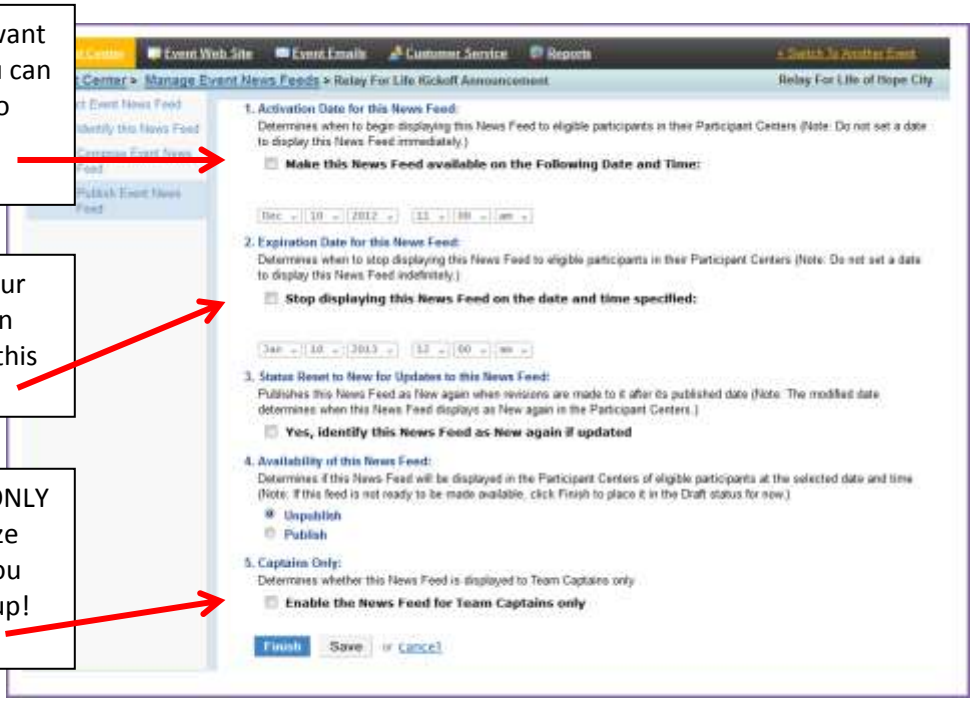
8. Once you have configured the content of your news feed, click **Save** and **Next**

The next step in the process is to **Publish** your news feed. There are a few different options for publishing… let's check them out!

You can set the start date. If you don't want to display the news feed right away, you can schedule it to run in the future (Note: Do not set a date to display this News Feed immediately.)

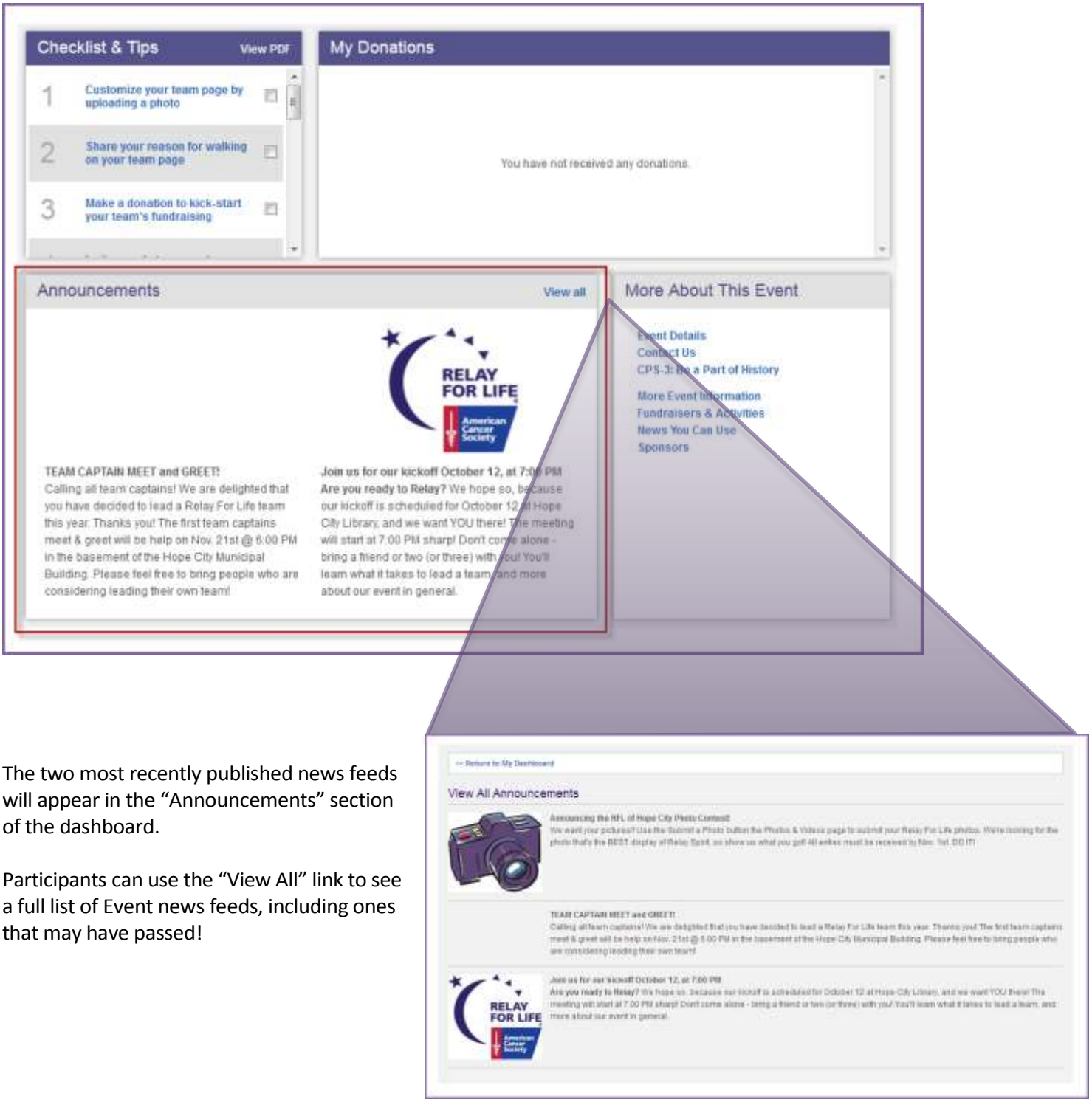
You can set the end date, if you want your news feed to auto-unpublish on a certain day. (Note: Do not set a date to display this News Feed indefinitely.)

You can make the news feed visible to ONLY team captains! So if you want to publicize an upcoming team captain's meeting, you can create a news feed for just that group!



Once you've configured the publish settings, select the **Publish** button, and click **Save** and **Finish**…

And the news feed(s) will appear in the My Relay Dashboard…
(See the next page for screen shots!)



The two most recently published news feeds will appear in the "Announcements" section of the dashboard.

Participants can use the "View All" link to see a full list of Event news feeds, including ones that may have passed!

Chapter 3: Event Manager Center – Manage Event Library

- Upload and Access Documents and Photos
    - Upload a Document to the Library
    - Create a link to a document
        - Create the link in a webpage
        - Create the link in an email
    - Upload an Image to the Library
    - Insert an Image
        - Create the link in a webpage
        - Create the link in an email
- Updating the Scrolling Images on Your Greeting Page

Upload and Access Documents and Photos

Adding photos and documents to your website can add information and fun. Before adding the photos or documents onto your website, you must first upload them to your event library.

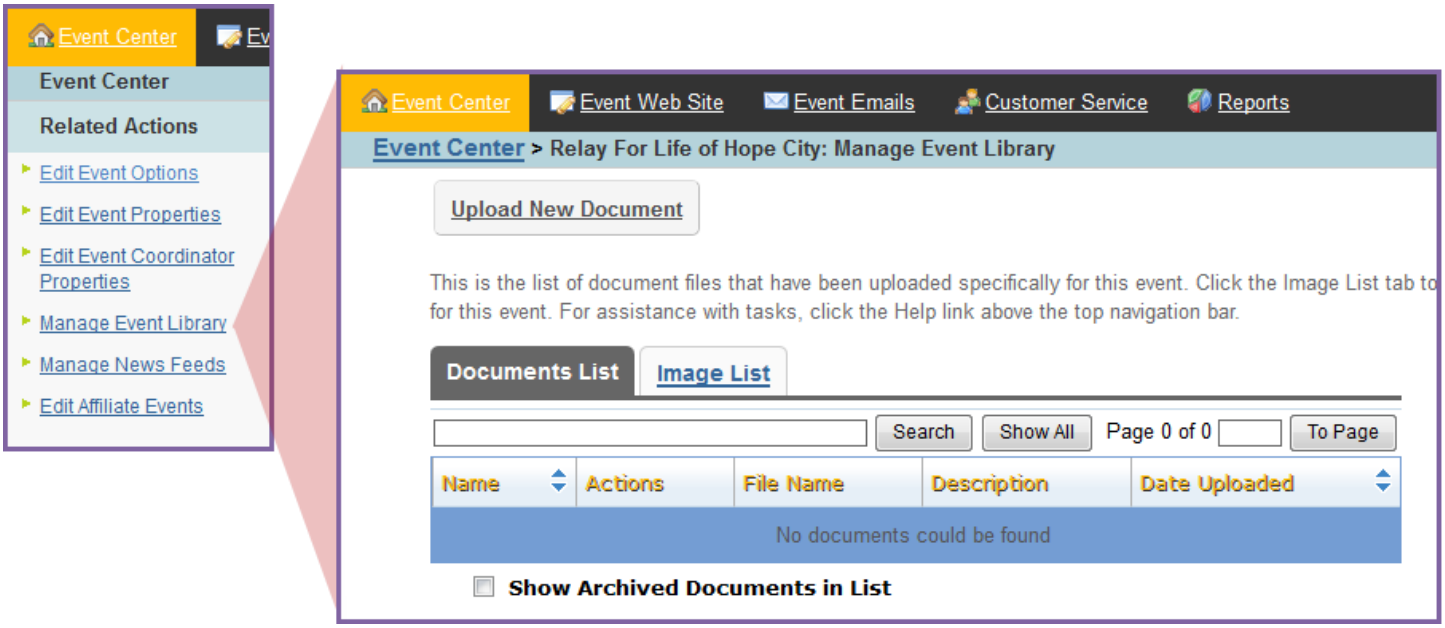
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

4. From the Event Management Center, click **Event Center** in the top Navigation Bar.

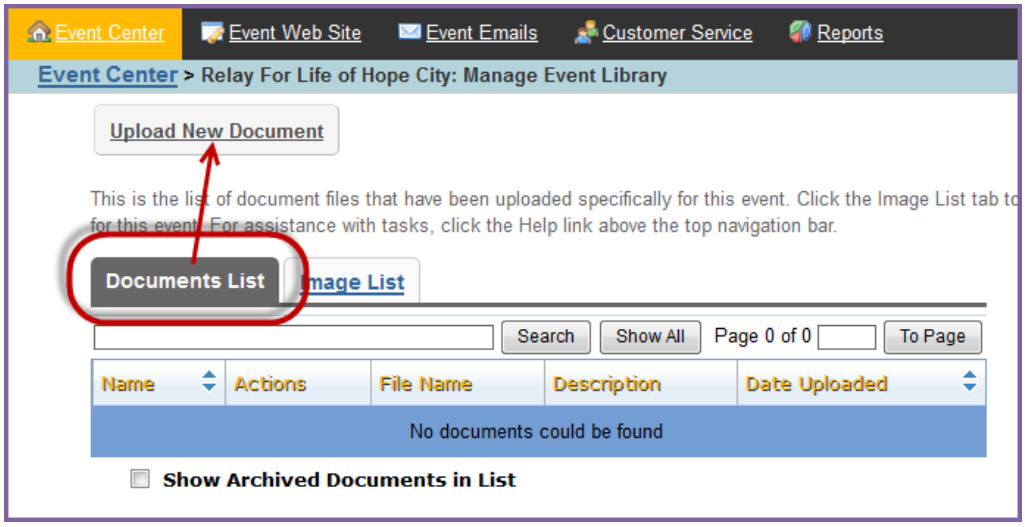
5. Under Related Actions (left hand side of the page), click **Manage Event Library**.



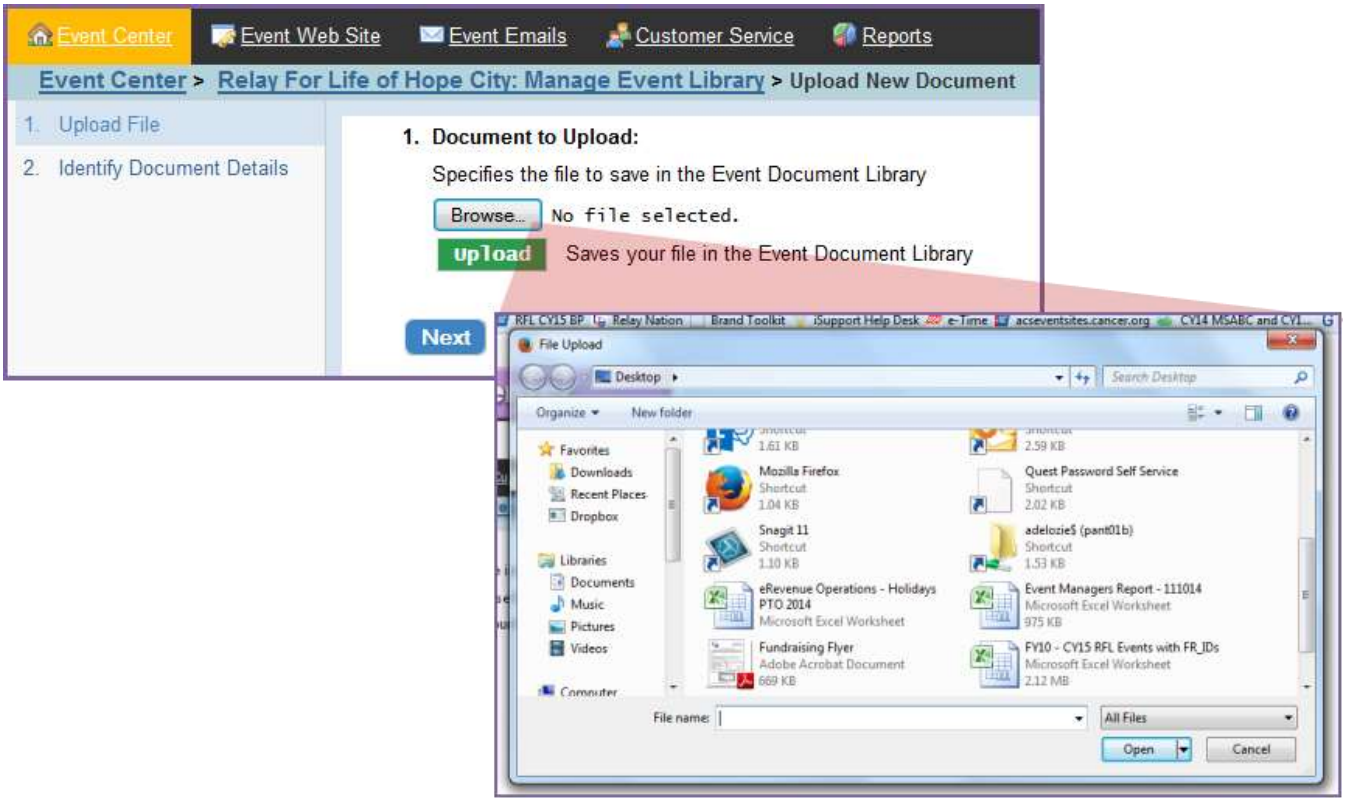
6. To upload or manage a new document, select the Documents List tab. To upload or manage a new image, click the Image List tab.

Upload a Document to the Library

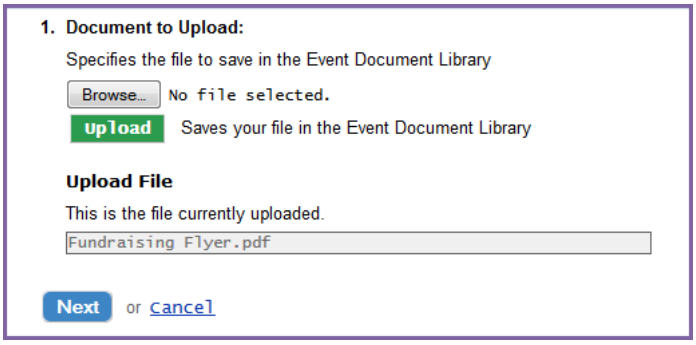
1. From the Event Management Center, click **Event Center** in the top Navigation Bar
2. Under Related Actions (left hand side of the page), click **Manage Event Library**.
3. Under the **Documents List** tab on the second level navigation, click **Upload New Document**.



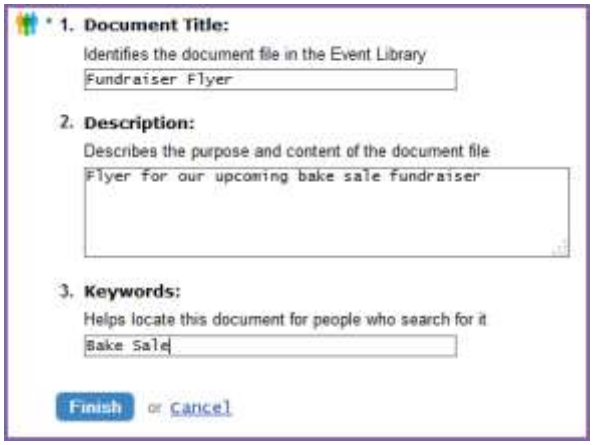
4. **Browse** to find the document on your computer.



5. Click **Upload** and **Next** once you have identified the document you would like to add to the library.

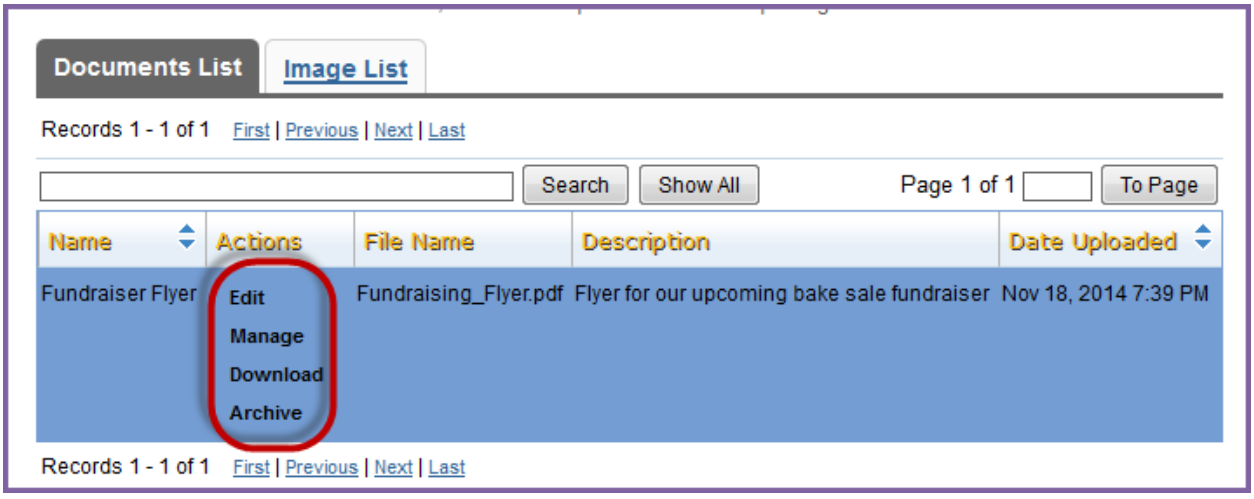


6. Identify your document in your Event Manager library by specifying the following:
    a. **Document Title** – The title will help you identify the document file in the Event Library.
    b. **Description** – Describe the purpose and content of the document file.
    c. **Keywords** – Keywords will help you locate the document when searching the library. When choosing keywords, use words that will make it easy to find document in the future if you cannot remember the name of the document.



7. Click Finish and the document will be added to your library.

8. Once a document is uploaded into the website, there are a few options available for the maintenance of your document library:



    a. **Edit:** Change the document title, description, and keywords.
    b. **Manage:** Upload and activate a new version of your document. You can also view prior versions of the document and make those versions active if needed. The versioning allows for easy replacement of documents when small changes are made without having to edit any links within your webpage.
    c. **Download:** Download a file in the library to your computer.

d. **Archive:** Archiving the document will make the file inactive and removes it from your document list view. You can choose to view archived items by selecting the Show Archived Documents in List checkbox at the bottom of the page. *Caution: If you archive a document all links to that document will be broken.*

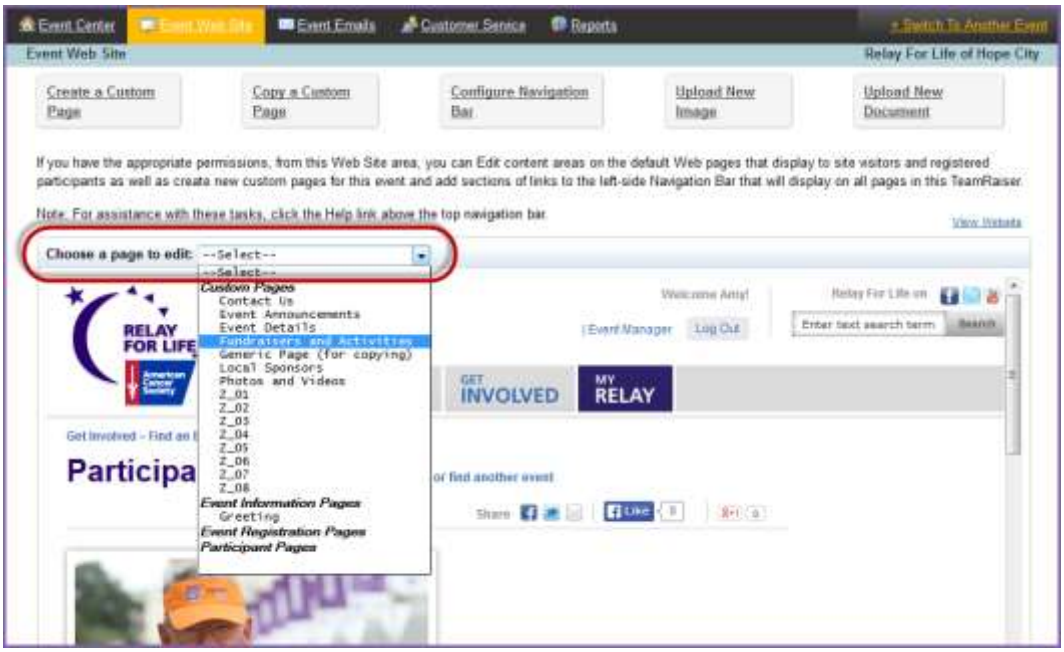
Create a Link to a Document

Once you have added the document to the Event Manager library, you can then create a link to that file on a webpage or in an email.

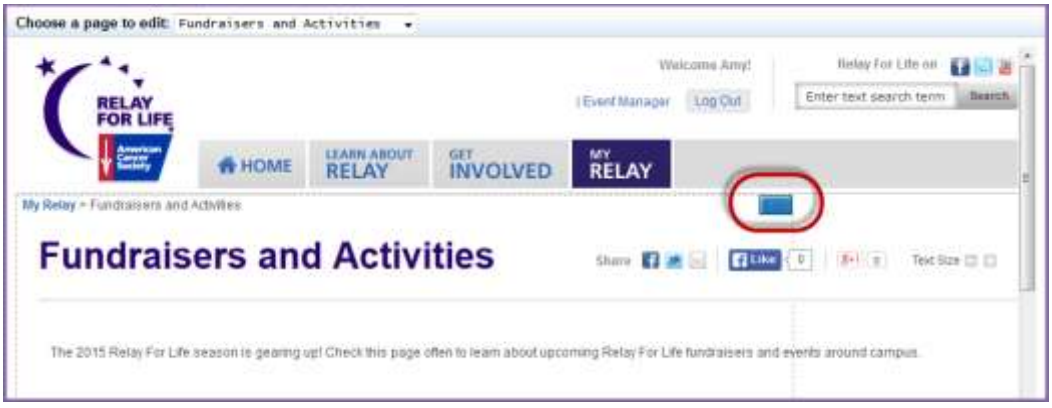
Create the link in a webpage:

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

2. From the drop down menu, choose the webpage you'd like to edit.

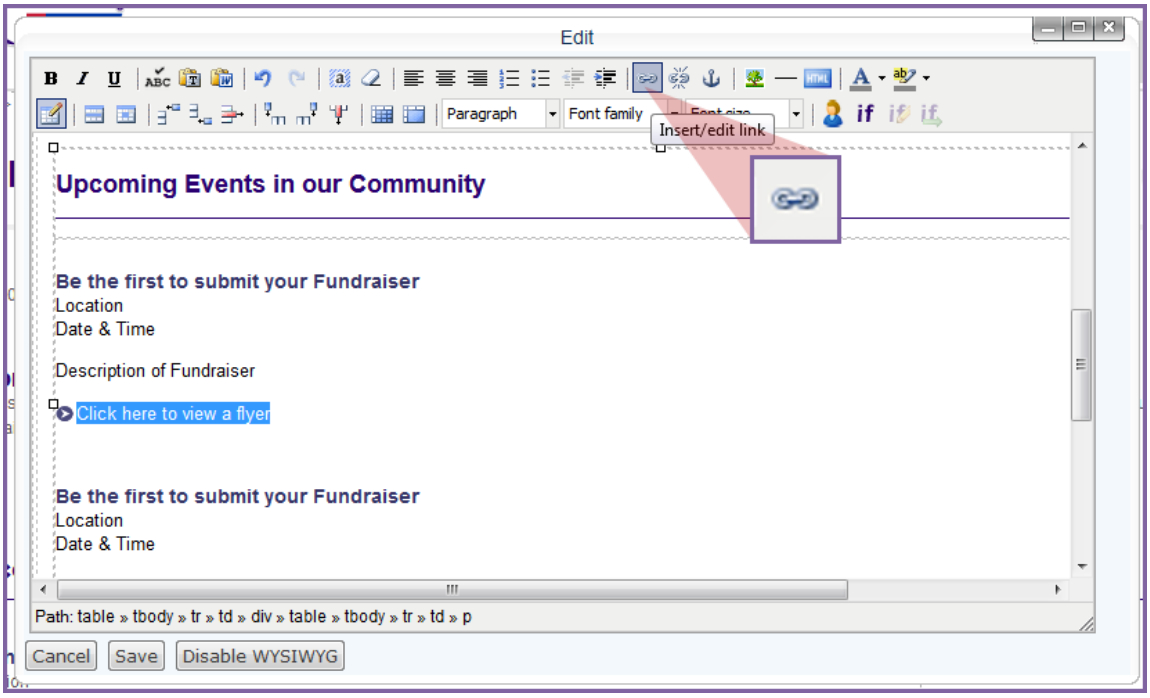


3. The page you wish to edit will appear below the drop down menu. To open the page for editing, selecting the small blue **Edit** box in the upper right hand corner.

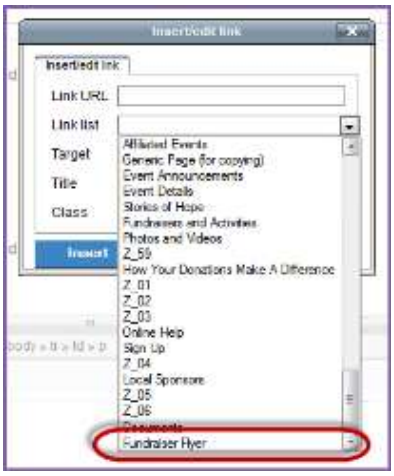


4. Create your desired link text by typing directly onto the page (i.e. View the flyer here).

5. Highlight the text you'd like to be a link, before choose the **Insert/Edit Link** button from the WYSIWYG tool bar.



6. From the link drop down menu, all the way at the bottom of that list, you'll find all the documents you have uploaded in your document library.



7. Select the document you want to insert from those available in the drop down menu.

8. Change the **Target** to **Open link in a new window**, so site visitors are not directed away from your website when they click the document link.

9. Click **Insert**.

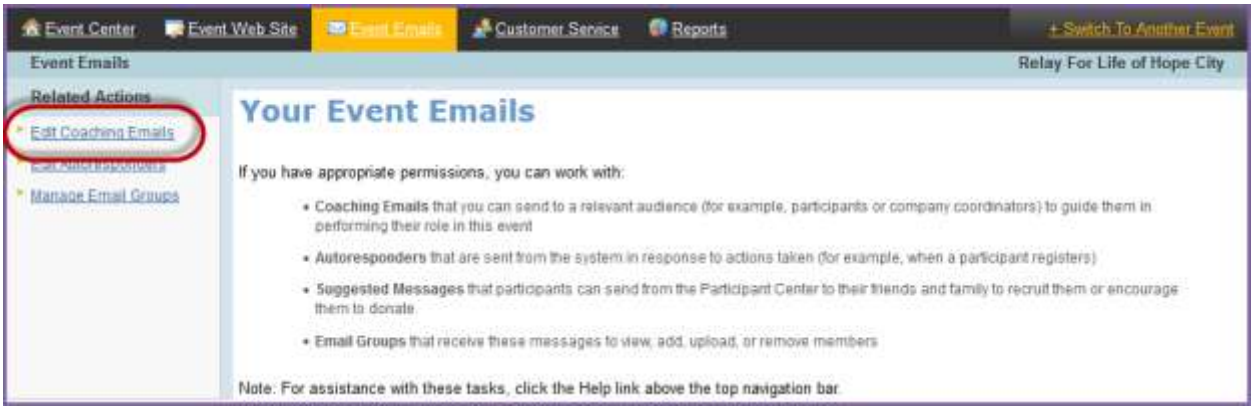
10. Once you save that page, the highlighted words will become a link to the document.

*** More information on how to edit a webpage can be found in [the next chapter](#).*

Create the link in an email:

1. From the Event Management Center, select the **Event Emails** section from the top Navigation Bar.

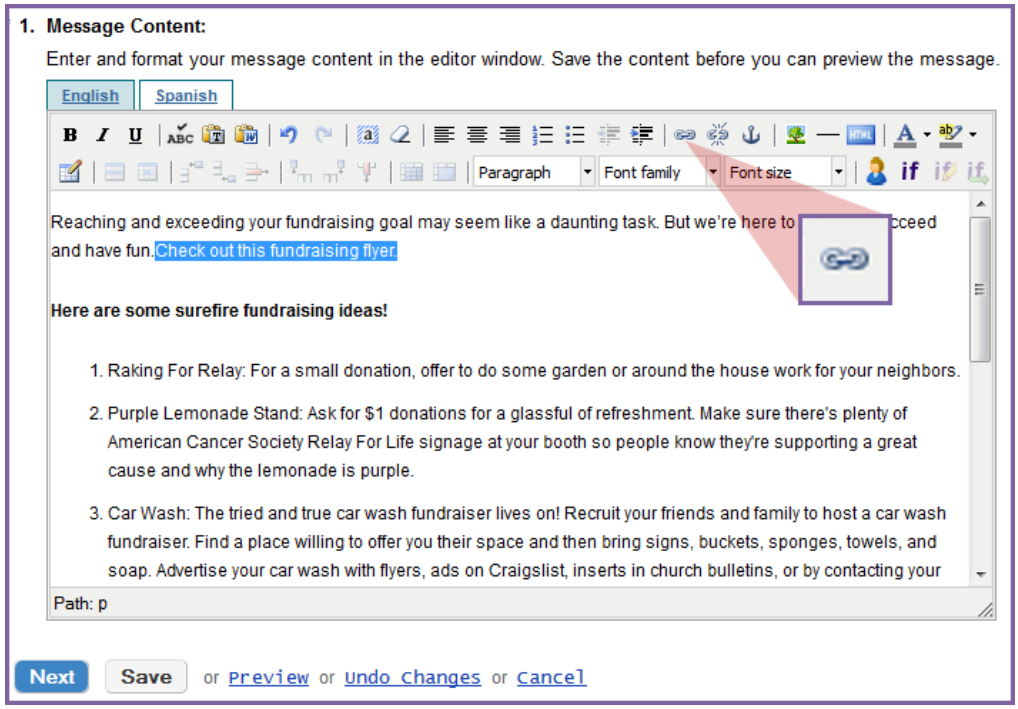
2. Under **Related Actions** (left hand side of the page), choose **Edit Coaching Emails** to find the email you wish to edit.



3. Follow the necessary steps to create and edit the email you wish to add the document to (More information on how to edit an email can be found in in the Event Emails chapter of the Online Manual).

4. On step **4. HTML Content**, create your desired link text by typing directly onto the email (i.e. View the flyer here).

5. Highlight the text you'd like to be a link, then click the **Insert/Edit Link** button from the WYSIWYG tool bar.

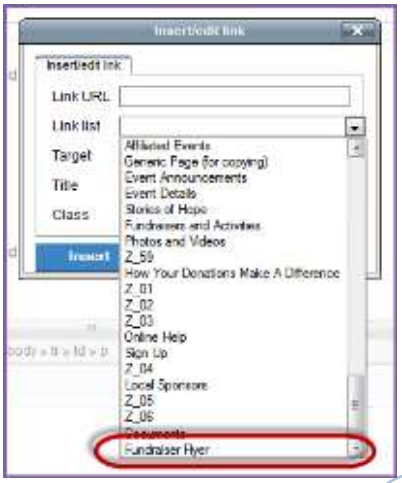


6. From the link drop down menu, all the way at the bottom of that list, you'll find all the documents you have uploaded in your document library.

7. Select the document you want to insert from those available in the drop down menu.

8. Change the **Target** to **Open link in a new window**, so site visitors are not directed away from your website when they click the document link.

9. Click **Insert**.



10. Once you save that email, the highlighted words will become a link to the document.

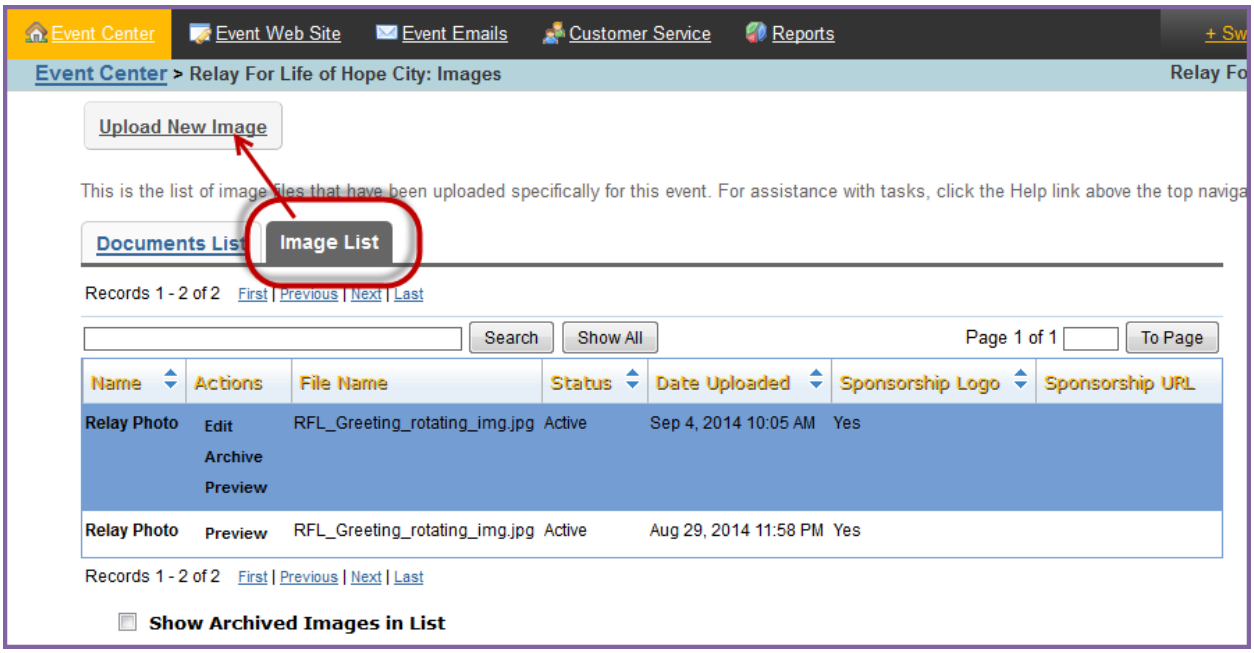
*** More information on how to edit an email can be found in the Event Emails chapter of the Online Manual.*

Upload an Image to the Library

1. From the Event Management Center, click **Event Center** in the top Navigation Bar

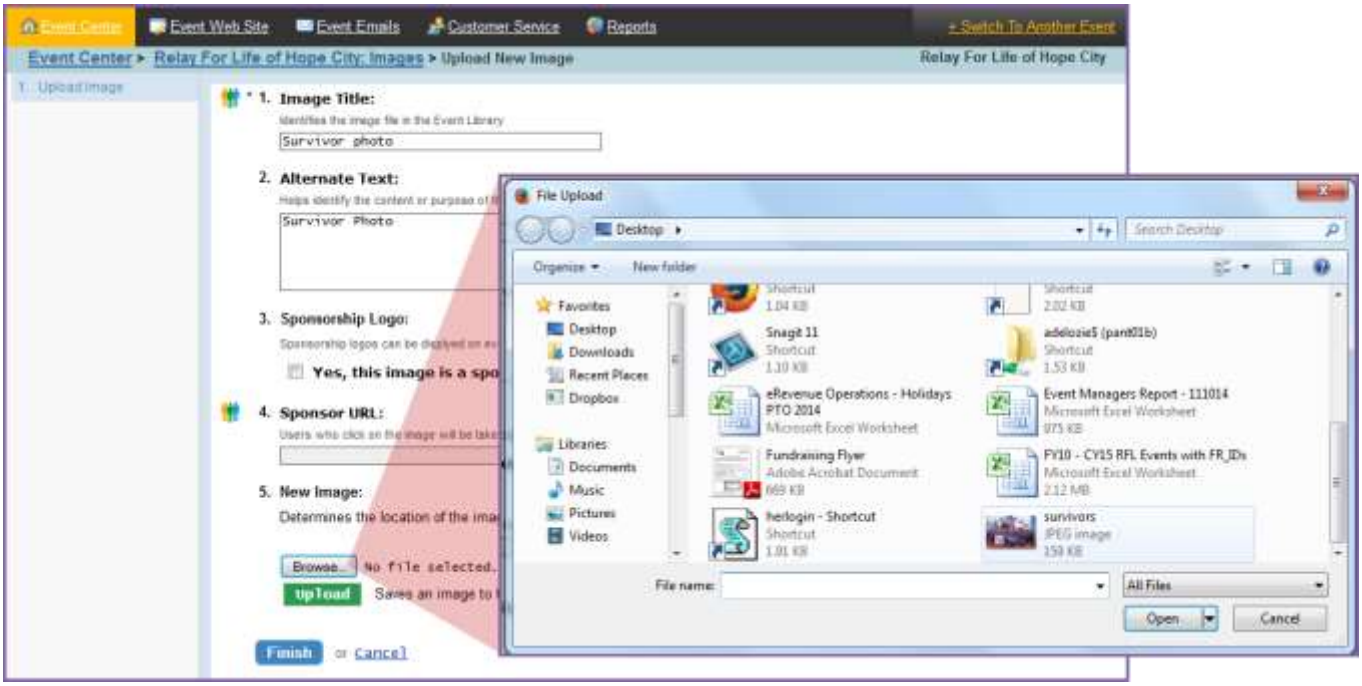
2. Under Related Actions (left hand side of the page), click **Manage Event Library**.

3. Under the **Image List** tab on the second level navigation, click **Upload New Image.**



4. To identify your image specify the following:

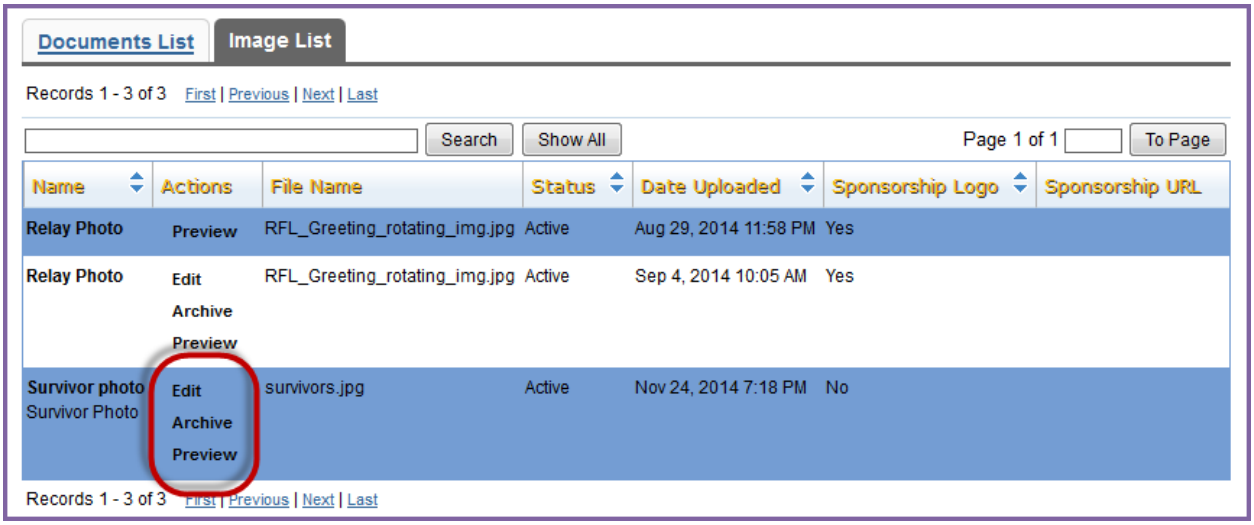
    a. **Image Title:** The title will help you identify the image file in the Event Library
    b. **Alternate Text:** Alternative text helps identify the content or purpose of the image (used in HTML img src tag). Alternative text is used as a replacement for an image, whenever the image cannot be seen online. This can happen, for example, when someone uses a speech browser, uses a text-only browser, uses a graphical browser with images turned off, has not yet downloaded the image, fails to download by an erroneous wire, or copies an extract from a webpage into a word processor.
    c. **Browse** to find the image on your computer**.**



5. Click **Upload**. Once your image has completed uploading it will display at the bottom of the page.

6. Select **Finish** and the image will be added to your library.

7. Once an image is uploaded there are a few options available for the maintenance of your image such as:



a. **Edit:** Change the image title, alternate text, or replace the image.
b. **Archive:** Archiving the image will make the file inactive and removes it from your image list view. You can choose to view archived items by selecting the **Show Archived Images in List** checkbox at the bottom of the page.
c. **Preview**: Preview the image as it would appear online.

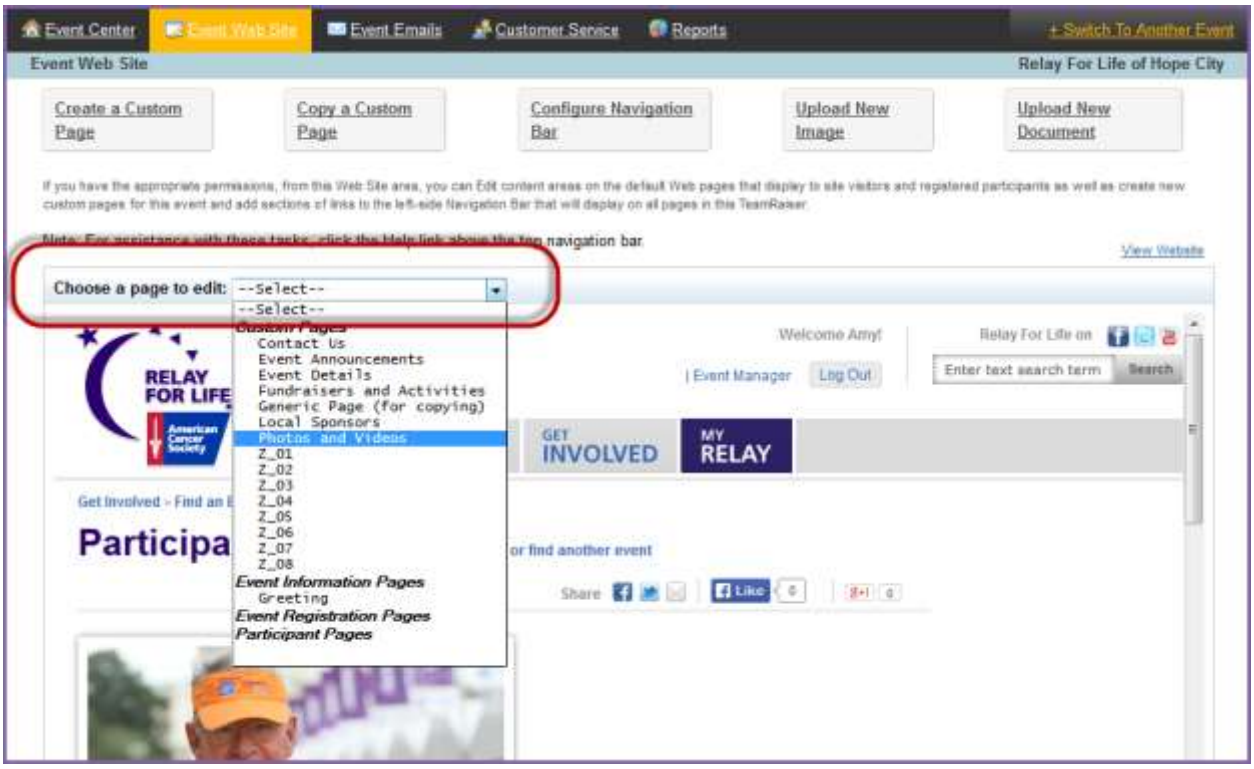
Insert an Image

Once you have added an image to the Event Manager library, you can then insert that image file on a webpage or in an email.

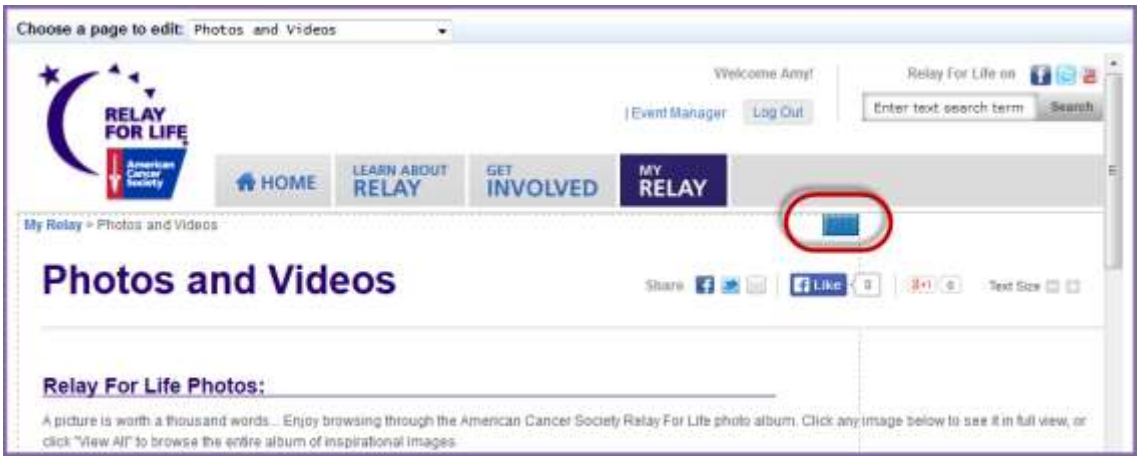
Insert an image in a webpage:

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

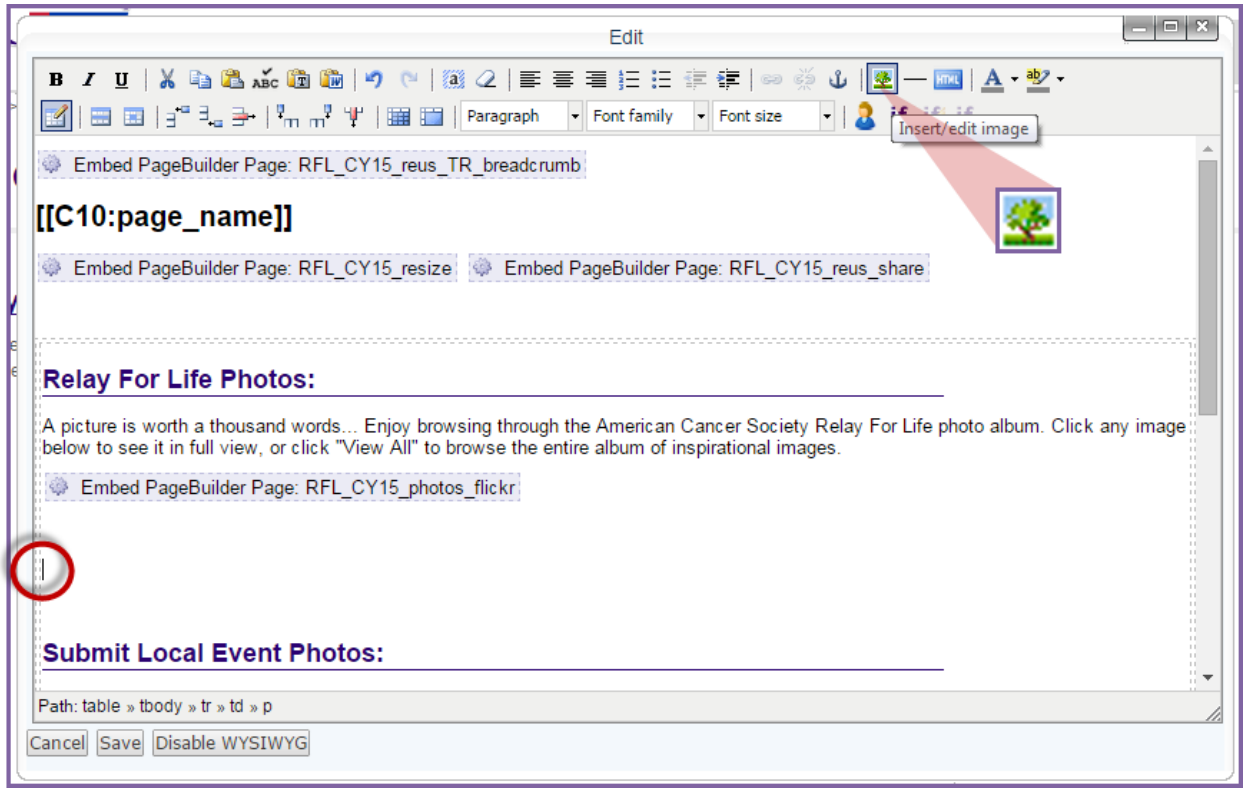
2. From the drop down menu, choose the webpage you'd like to edit.



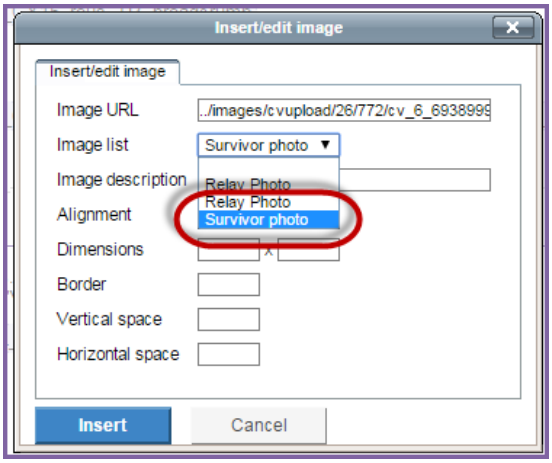
3. The page you wish to edit will appear below the drop down menu. To open the page for editing, selecting the small blue **Edit** box in the upper right hand corner.



4. Place curser at desired location on the webpage where you would like to add the picture.
    a. Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
c. Select the image you wish to insert from those available in the drop down menu. Click **Insert**.
d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.
e. Once you save that page, the image will appear on the website.

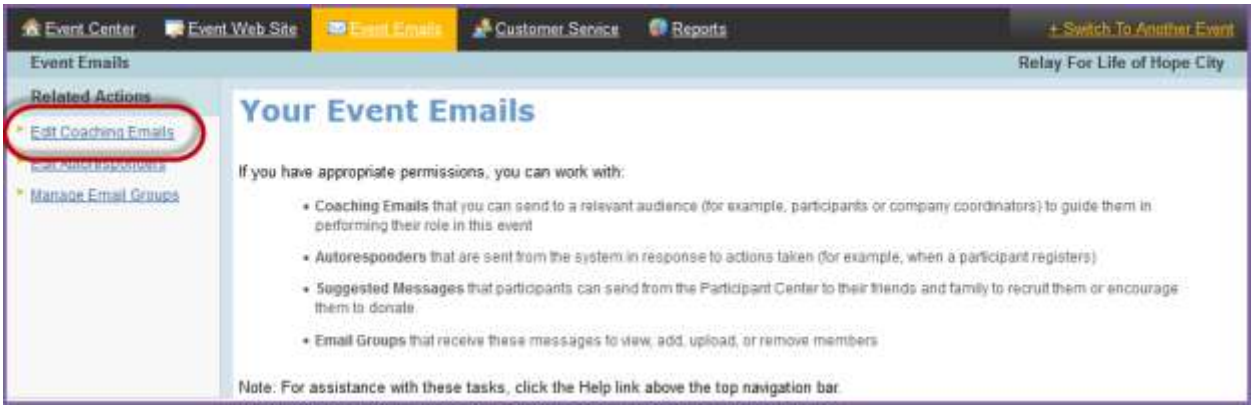


*** More information on how to edit a webpage can be found later in [the next chapter](#).*

Insert the image in an email:

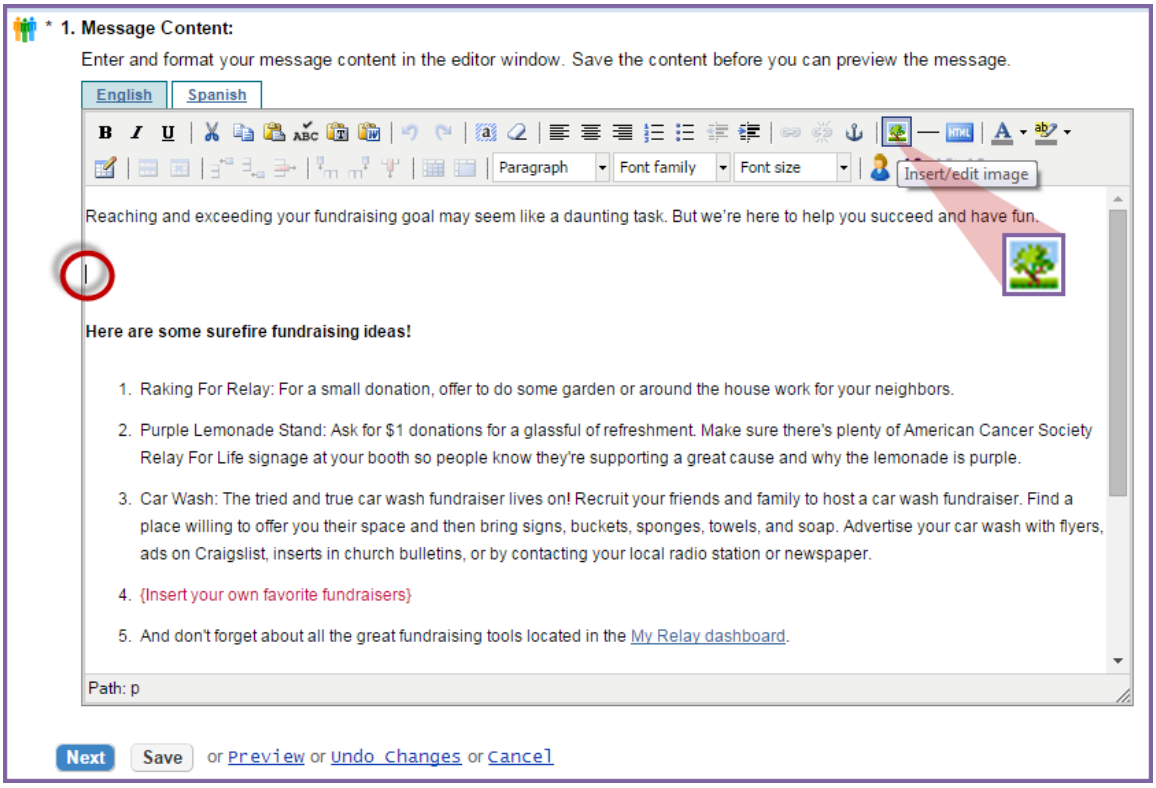
1. From the Event Management Center, select the **Event Emails** section from the top Navigation Bar.

2. Under **Related Actions** (left hand side of the page), choose **Edit Coaching Emails** to find the email you wish to edit.



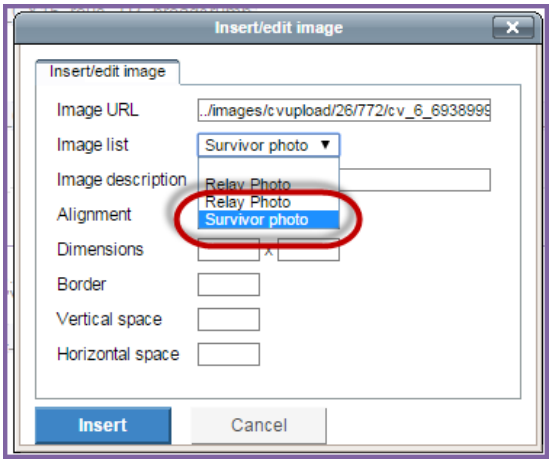
3. Follow the necessary steps to create and edit the email you wish to add the document to (More information on how to edit an email can be found in in the Event Emails chapter of the Online Manual).

4. On step **4. HTML Content**, place your curser at desired location in the email where you would like to add the picture.
   a. Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



   b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
   c. Select the image you wish to insert from those available in the drop down menu. Click **Insert**.

d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.
e. Once you save that page, the image will appear on the website.



*** More information on how to edit an email can be found in the Event Emails chapter of the Online Manual.*

Updating the Scrolling Images on Your Greeting Page

You can update the scrolling images that appear on your local event Greeting Page (also known as the event's Media Wall). This is a great way to highlight photos from the prior year event, and give your website a more local look and feel!

You simply need to upload and designate the image files appropriately to have them display in the Media Wall component on the event greeting page. Just follow the step by step instructions below!

Resize the Media Wall Photos

The photos for your media wall should be resized to **340 pixels wide** by **240 pixels high** prior to uploading them to the image library.

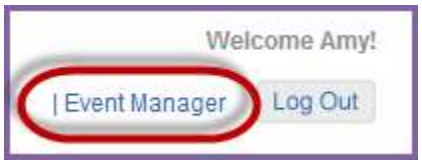
- Here is an easy web-based photo resizer you can use to get your pictures down to the right size: http://www.picresize.com/

Upload your Media Wall Photos to the Image Library

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

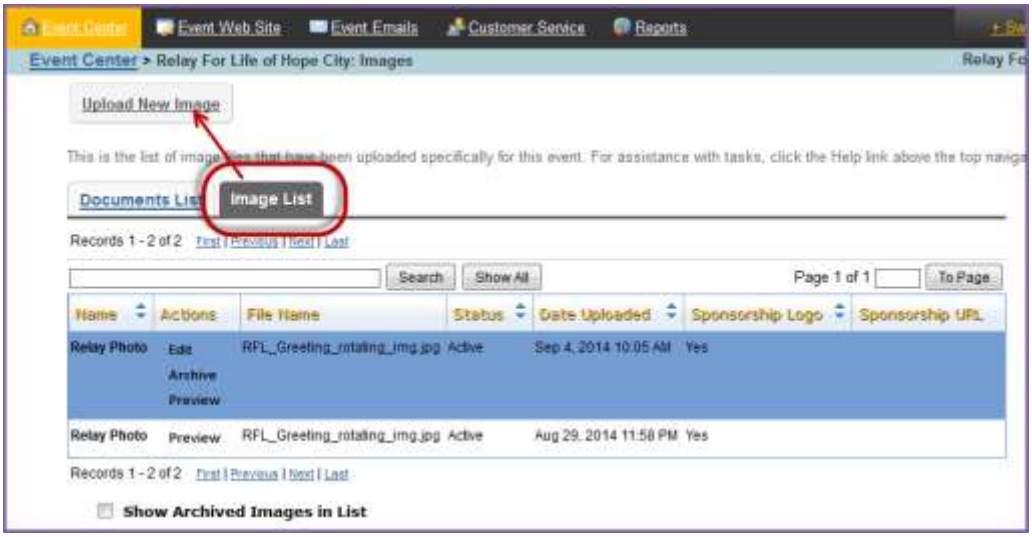
3. Click the **Event Manager** link on the top right side of the page.



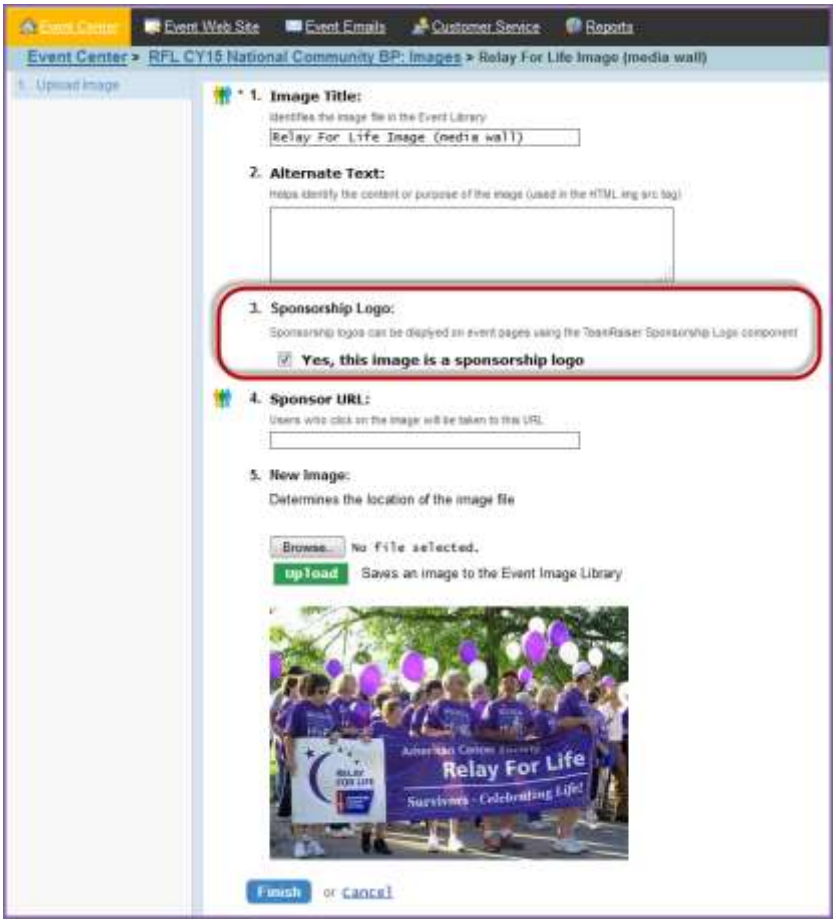
4. From the Event Management Center, click **Event Center** in the top Navigation Bar.

5. Under Related Actions (left hand side of the page), click **Manage Event Library**.

6. Under the **Image List** tab on the second level navigation, click **Upload New Image**.



7. To identify your Media Wall image specify the following:
    a. Give your image file a name. Within the name you may want to specify it is a 'media wall' photo to distinguish it from the other photos in your library
        i. ***Note:*** *all logo images will display in order alphabetically by the logo title. To display the logos in a specific order, you can preface the 'Image Title' with a numbering sequence.*
    b. Make sure that the **"Yes, this image is a sponsorship logo"** box is checked
        i. If you do not click the checkbox to include the current photo in the media wall, it will just remain in your library – you can easily edit the image later on and check the box accordingly.
        ii. *It's important to note that even though the check box says 'sponsor logo,' checking this box will add it to your media wall, not your sponsor scroll. To create your scrolling sponsor logo file, you should continue to follow the sponsor logo instructions.*



c. Locate the newly resized image in your computer files, and upload!

8. Click **Finish**

Once uploaded, your photo(s) will now appear on the Greeting Page!

Chapter 4: Event Manager Center – Edit and Create Content Pages

- Editing a Web Page
    - Pages to Edit
    - How to Edit a Page
    - Adding Advanced HTML code to your page
    - Home Page Text Samples
- Insert Documents and Photos
    - Create a link to a document
    - Insert an Image
- Copy a custom page
- Create a custom page
- The Navigation Bar
    - Setting Up the Navigation Bar

As the Relay For Life Online Chair, you may customize and add local information to various webpages. Photos and documents can also be included on your event website. Be sure to add new content to your website often and throughout the Relay season. The more you update your website, the more it will be used as an informational and fundraising source by your participants.

Editing a Web Page

Keep your website current and fresh with local event information, details, and flare. Remember to update the appropriate pages often to keep your community engaged in the fight against cancer! The more you update your website, the more it will be used as an informational and fundraising source by your participants.

Pages to Edit

Required Web pages to edit:

- Event Announcements - Add local announcements, important dates and meetings, forms and flyers, as well as any other event specific information you wish to share
- Event Details – Update with the ceremony times
- Fundraisers & Activities - Add upcoming activities, and fundraisers submitted by site visitors
- Local Sponsors - Update Sponsor Levels as appropriate, and add your sponsor logos (must be resized to 310px width max)

Other pages to edit:

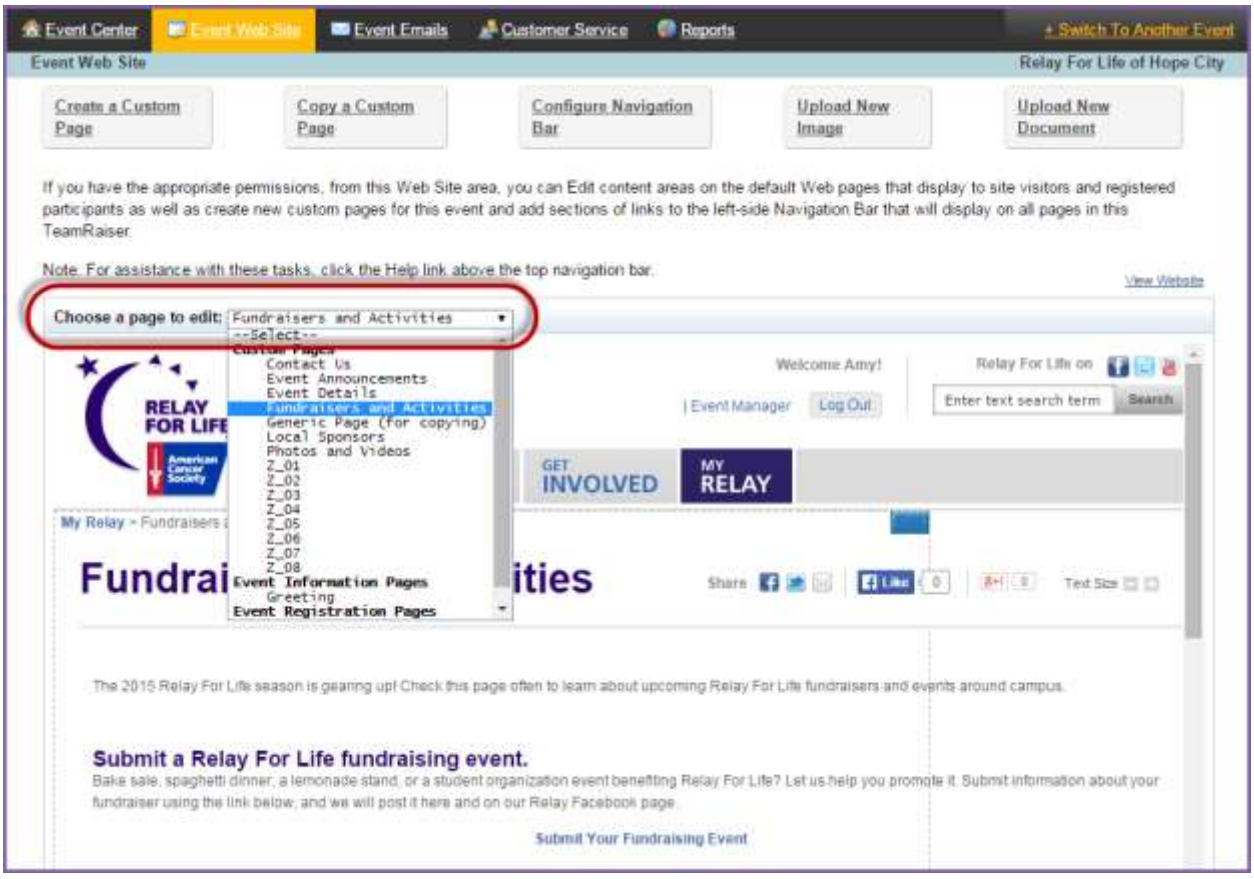
- Greeting Page
- Photos and Videos - Add local Relay photos as desired (must be resized to 310 px width max). Please know, this page does not currently appear on your website, however you may link anywhere you wish throughout your website.
- Blank/Custom pages

***Note**: Your Event Web Site content can be customized at any point during the Relay season. Please make sure you are keeping the webpage content updated and relevant throughout the Relay season.*

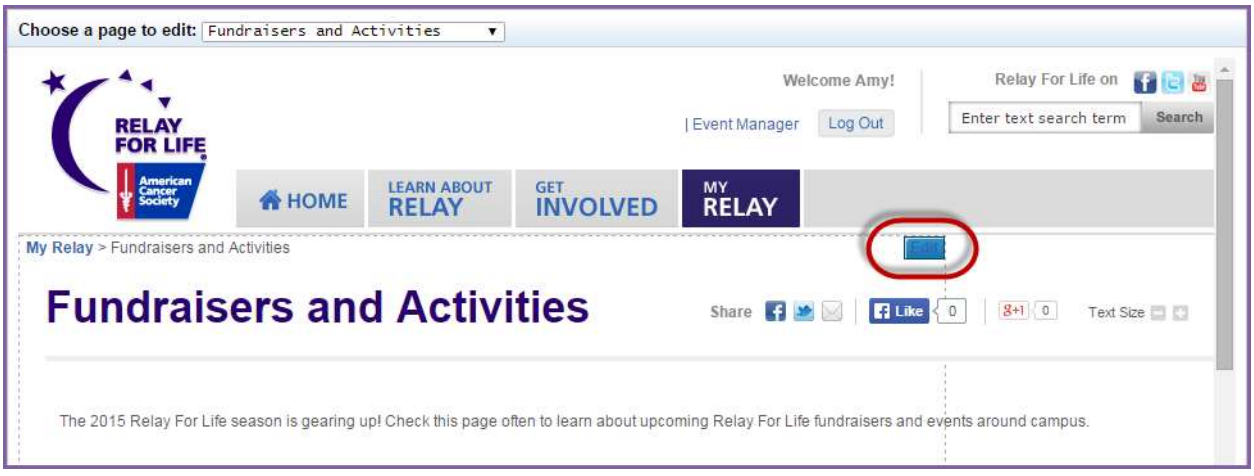
How to Edit a Page

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

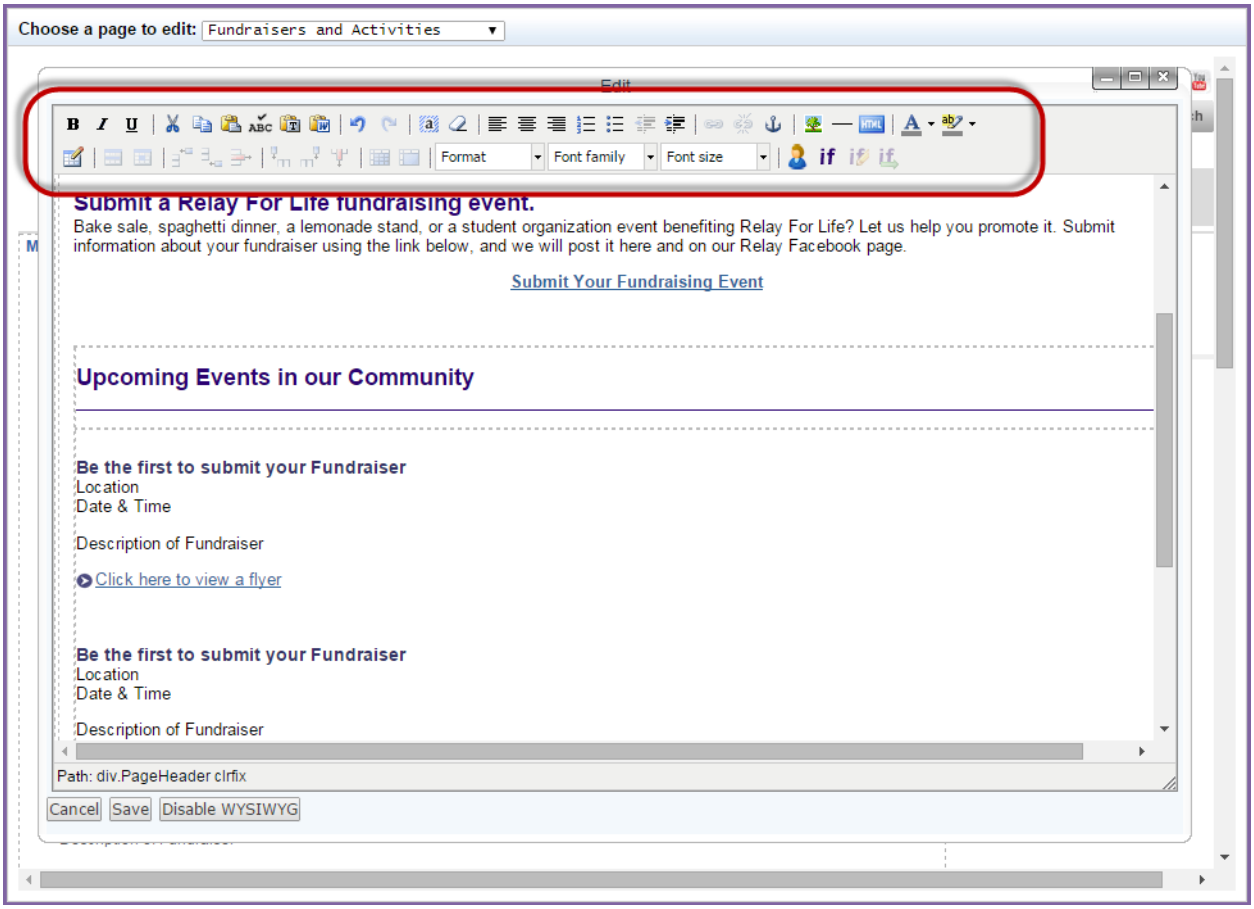
2. From the drop down menu, **choose** the webpage you'd like to edit.



3. The page you wish to edit will appear below the drop down menu. The editable regions of the page will be outlined with a dashed line. To open the page for editing, selecting the small blue **edit** box in the upper right hand corner.



4. The edit field will become available. The **WYSIWYG tool bar** will enable you to edit the content of the page.



   a. Type directly in the webpage to add content.
   b. Use the WYSIWYG tool bar to add color or font changes to your text.
   c. Add images or links to documents to further enhance your webpage message.

5. Click **Save** often to ensure that your work is saved. Once saved, the edited webpage will be reflected online for visitors to view.

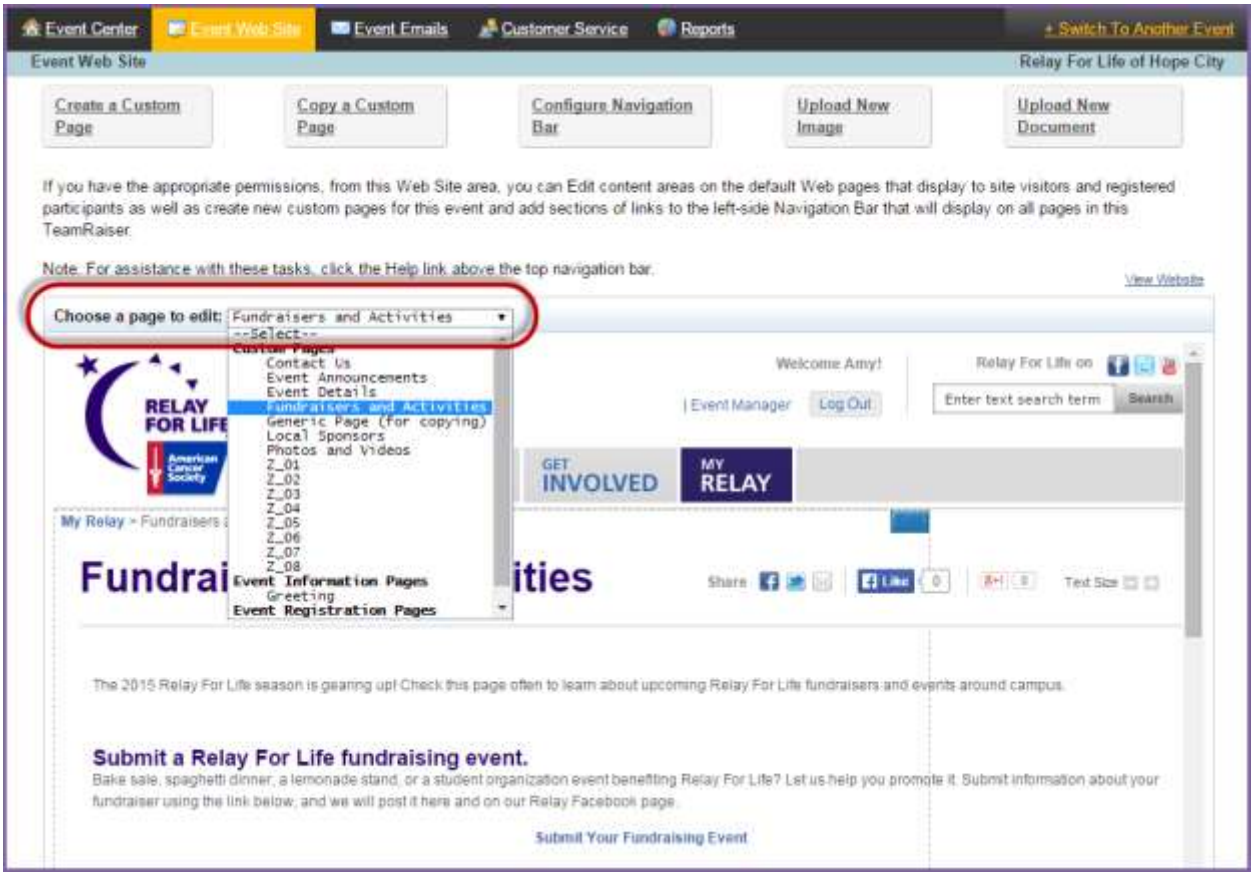
***More information about the WYSIWYG is available in Appendix D WYSIWYG Basics and HTML Quick Sheet.*

Adding Advanced HTML code to your page

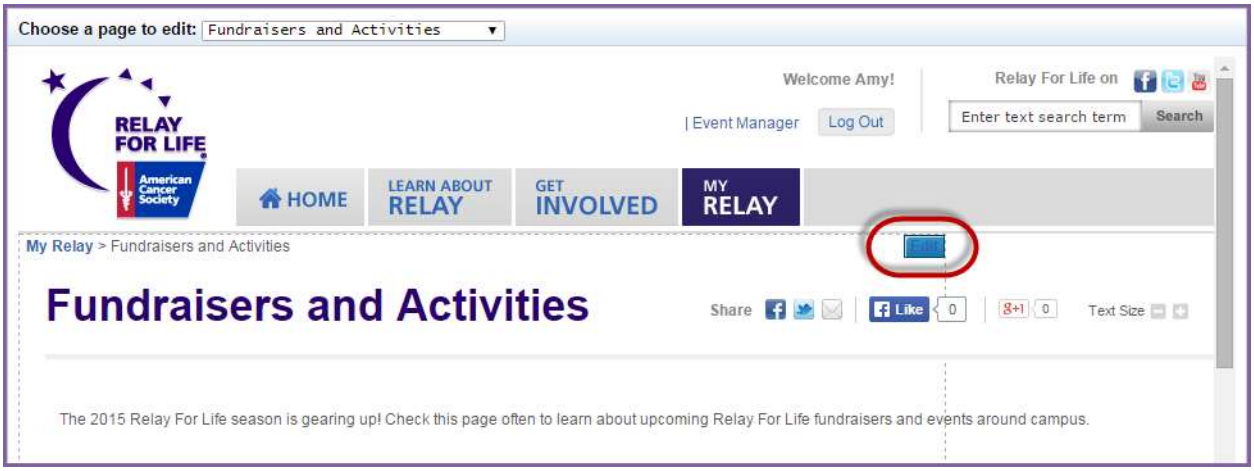
Updating your Relay For Life webpages can be done through the use of the WYSIWYG (What You See Is What You Get) tool bar. Additional edits, including embedding maps and videos, will require using advanced HTML coding.

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

2. From the drop down menu, **choose** the webpage you'd like to edit.

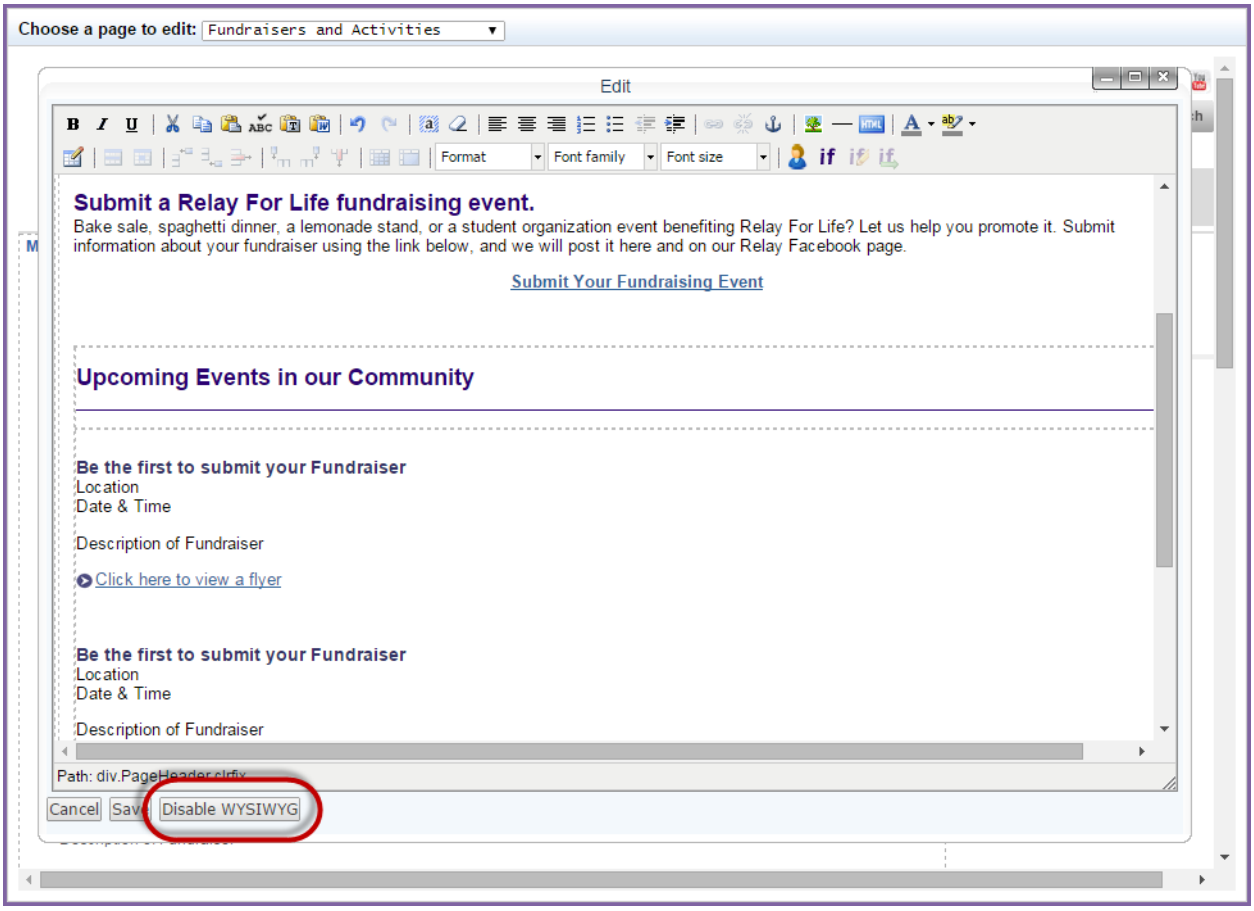


3. The page you wish to edit will appear below the drop down menu. The editable regions of the page will be outlined with a dashed line. To open the page for editing, selecting the small blue **edit** box in the upper right hand corner.

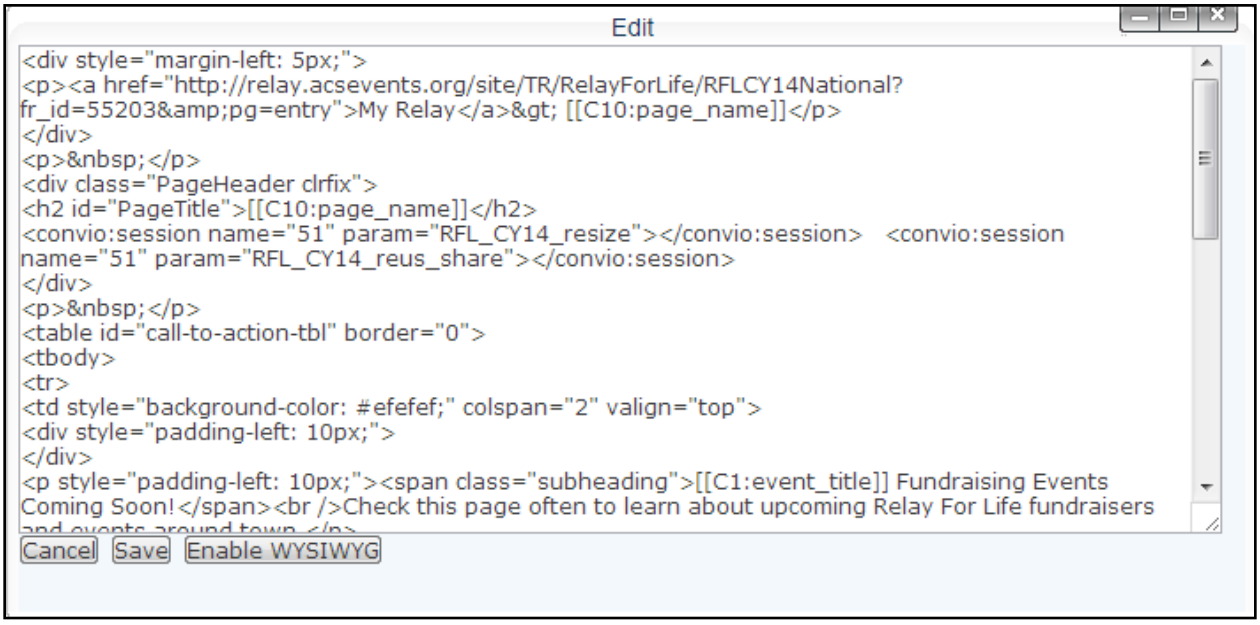


4. The edit field will become available. The **WYSIWYG tool bar** will enable you to edit the content of the page. From the WYSIWYG tool bar, select the **HTML** button, or choose the **Disable WYSIWYG** button from the bottom of the editable field. This will switch the view to HTML code.

This view is not recommended if you are unfamiliar with HTML code.



5. The HTML code of the page will be visible. Make any changes in the HTML coding to achieve the updates you wish to have represented on the page.



6. Once you have completed the advanced code, click the **Save** button. Once saved, the edited webpage will be reflected online for visitors to view.

***More information about HTML code is available in Appendix D WYSIWYG Basics and HTML Quick Sheet.*

Greeting Page Text Samples

Pre-Kickoff

Each year, across the nation, one event brings together entire communities to take part in the fight against cancer. That event is the American Cancer Society Relay For Life. It's a time and place where people come to celebrate those who have survived cancer, remember those we've lost, and fight back against a disease that touches too many lives.

Won't you join us this year and be a part of Relay? Click Sign Up to be a part of this amazing event.

After you register, make plans to join us at the Relay For Life kickoff celebration. We'll get the season started with an informative and inspirational event on <date> at <location> at <time>. If you're interested in learning more or receiving an invitation, please email us at <email address> or call <number>.

Post-Kickoff

Our community is busy making plans for this year's American Cancer Society Relay For Life. Register today to be a part of a great event!

Cancer affects millions of people across the globe and many people right here in our hometown. By being a part of Relay For Life, everyone has an opportunity to celebrate survivors, remember the people we've lost to cancer, and fight back against this disease.

Sign up today. We need your help to spread hope for a future where cancer no longer threatens the lives of the people we love.

Survivor Message

Our goal is to create a world where more people survive cancer so they can celebrate another birthday. This year more than 11 million people will be able to do that thanks to the support to dedicated Relay participants like you.

Survivors have a very special place at Relay: they represent the progress we've already made in the fight against cancer and provide us with hope.

If you're a cancer survivor, or if you know of someone who is, we want to honor you at Relay. Sign up today.

Saving Lives Message

Fewer people are losing their lives to cancer every year. But there is still work to be done.

By getting involved in Relay For Life, you can help the American Cancer Society continue its lifesaving work. Sign up and donate today.

Helping Those Touched By Cancer Message

For people facing cancer, or those caring for someone who is, a helping hand can be very important. Whether it's finding answers to questions about insurance and finances, offering patients and caregivers a place to stay during cancer treatment, or simply connecting people with someone who's "been there," the American Cancer Society offers help when it's needed most.

The American Cancer Society is available to offer its information service 24 hours a day, seven days a week – so those seeking help can find it anytime, day or night.

These programs and services are made possible because of your support of Relay For Life. By being a part of Relay and

raising funds and awareness, you can help make sure those important services are there to make a difference to people touched by cancer. Thank you for helping provide support!

Empowering People to Fight Back against Cancer Message

Fighting cancer is a serious effort, both for those facing the disease and those working to save lives. One person can make a difference. Your involvement with the American Cancer Society Relay For Life is essential to defeating cancer once and for all. No matter how you choose to participate – as a donor, a team member, or a survivor – you have the power to fight back against a disease that affects millions.

Pre-event Logistics Message

Are you ready for Relay? The big event is right around the corner!

Teams have already been working hard to raise funds and awareness to help the American Cancer Society and its lifesaving efforts – but it's not too late to be a part of Relay. If you want to form a team, invite others to join, raise funds, or attend the event itself, there is still time!

Here's what you need to know:

1. Final Team Captain Meeting will be held at <local information>.
2. Remember that fundraising doesn't stop on the day of Relay – donations can be online and onsite!
3. Remember to bring all of the Luminaria with you to Relay.
4. Don't forget to plan refreshments and fun for your team during the overnight hours that you spend at Relay.
5. <other local important notes here>

You won't want to miss:

- Opening Ceremony – <time>
- Survivors' Lap and Celebration – <time>
- Luminaria Ceremony – <time>
- Closing Ceremony – <time>

We'll see you there! Questions? Contact: <name> at <email address> or call <number>.

Post-Event Message

We did it! Congratulations <community name> on an incredible Relay.

Thank you for providing your time, your talents, and your heart to our mission. Through your generosity, we are creating a world with more birthdays.

A million words of gratitude to our superstars <insert names of VIPs/top teams/committee etc. here>

There are so many of you to thank, so let's do this right and have a party. Our Relay For Life Wrap Up Party will be <insert date and location>.

Even though the Relay For Life event is over, we can still raise more to help in this fight; you can donate online now, or contact our committee to get more involved with planning the event next year.

Congratulations and thank you!

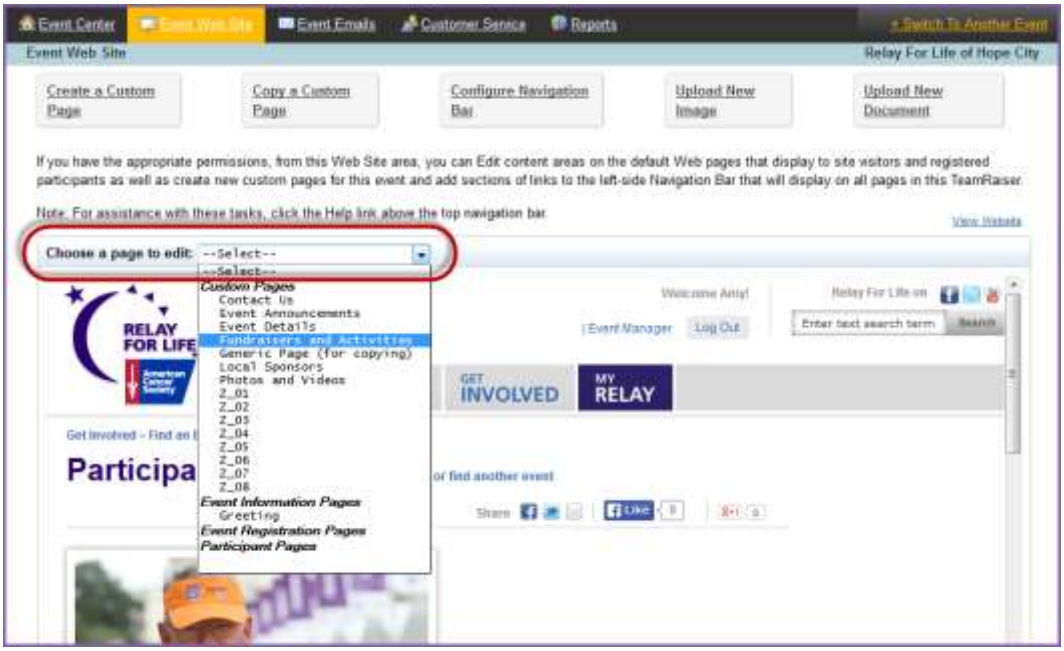
Insert Documents and Photos

You can add localized photos and documents to your event website. They must be added to the Event Library prior to inserting into your web pages. See chapter 3: Manage Event Library for helping adding photos and documents to your library.

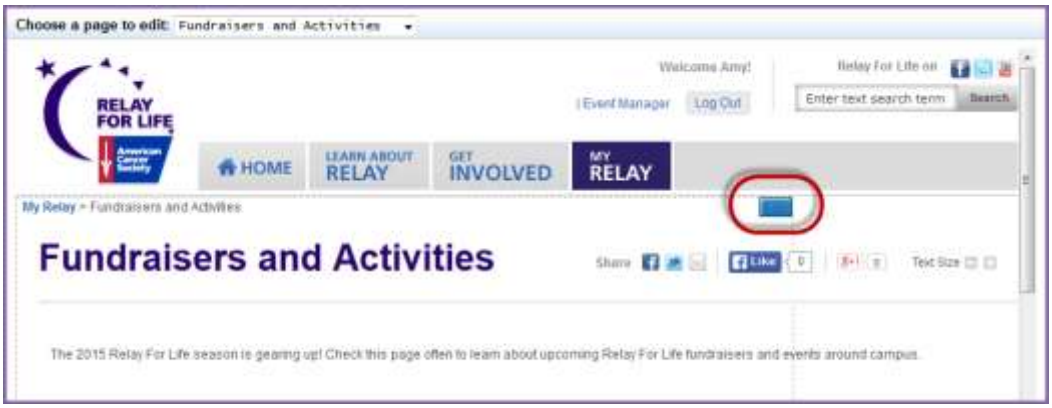
Create a Link to a Document

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

2. From the drop down menu, choose the webpage you'd like to edit.

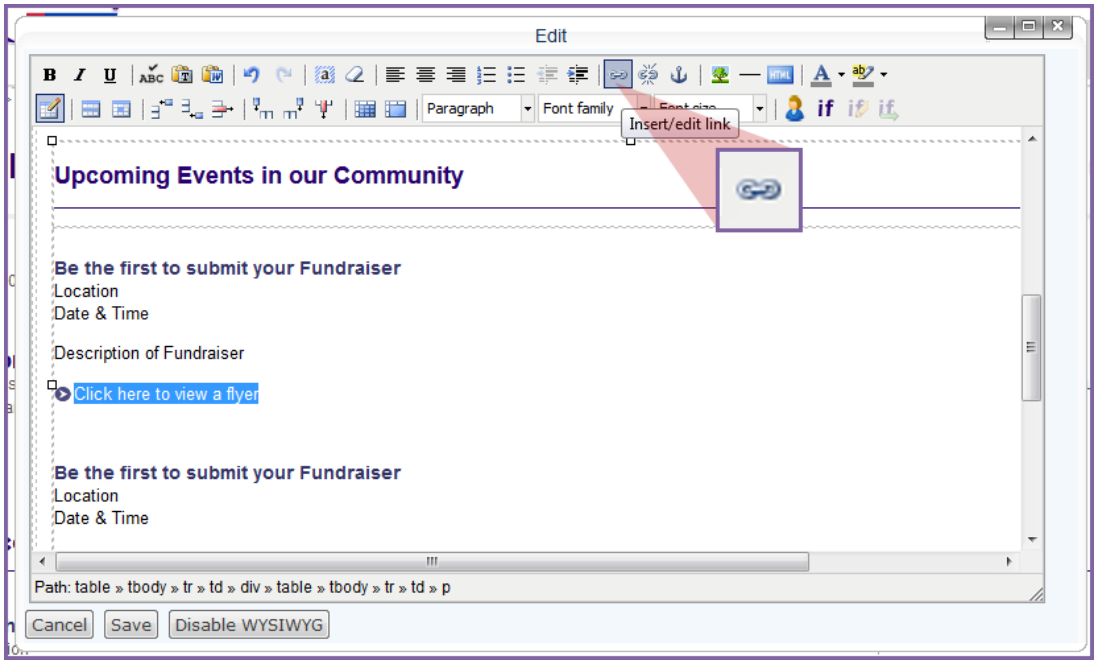


3. The page you wish to edit will appear below the drop down menu. To open the page for editing, selecting the small blue **Edit** box in the upper right hand corner.



4. Create your desired link text by typing directly onto the page (i.e. View the flyer here).

5. Highlight the text you'd like to be a link, before choose the **Insert/Edit Link** button from the WYSIWYG tool bar.



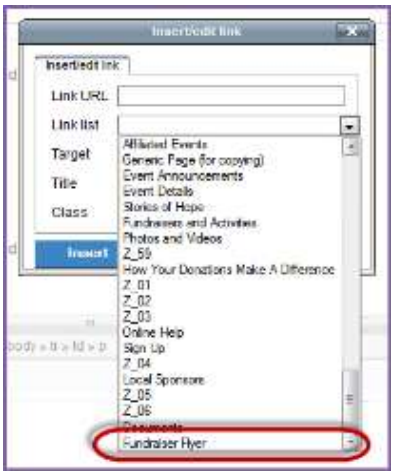
6. From the link drop down menu, all the way at the bottom of that list, you'll find all the documents you have uploaded in your document library.

7. Select the document you want to insert from those available in the drop down menu.

8. Change the **Target** to **Open link in a new window**, so site visitors are not directed away from your website when they click the document link.

9. Click **Insert**.

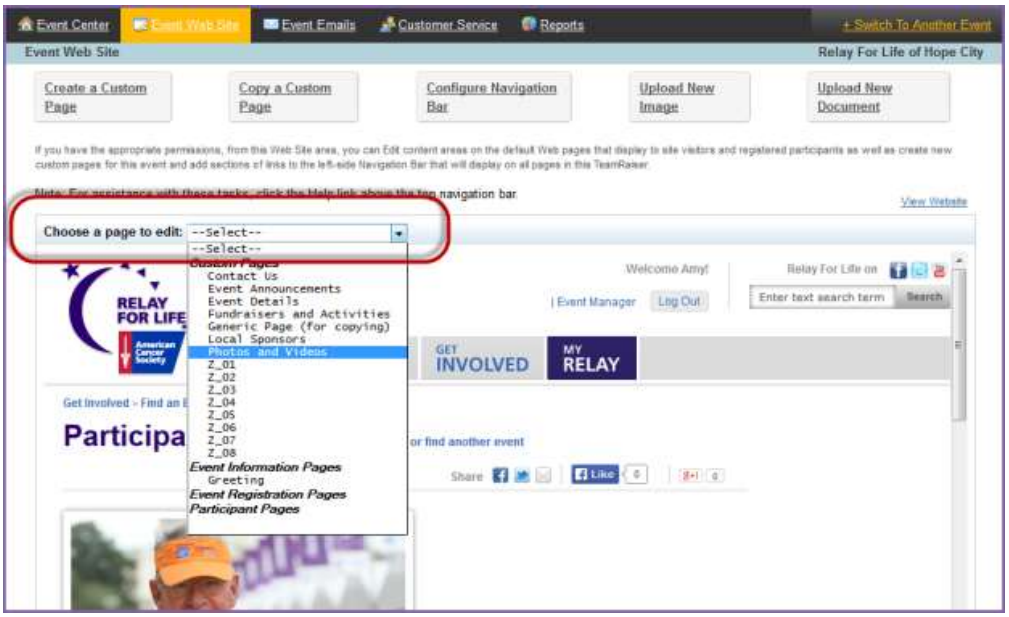
10. Once you save that page, the highlighted words will become a link to the document.



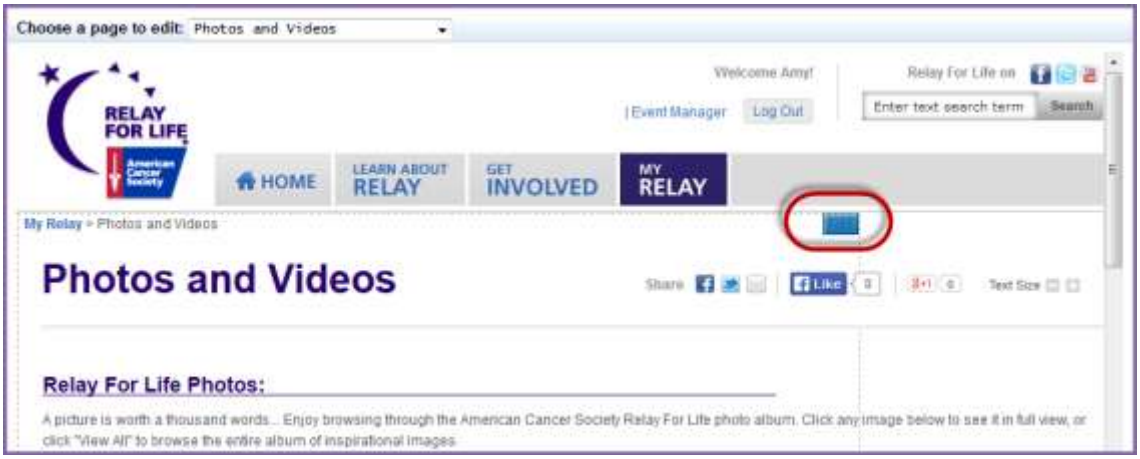
Insert an Image

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

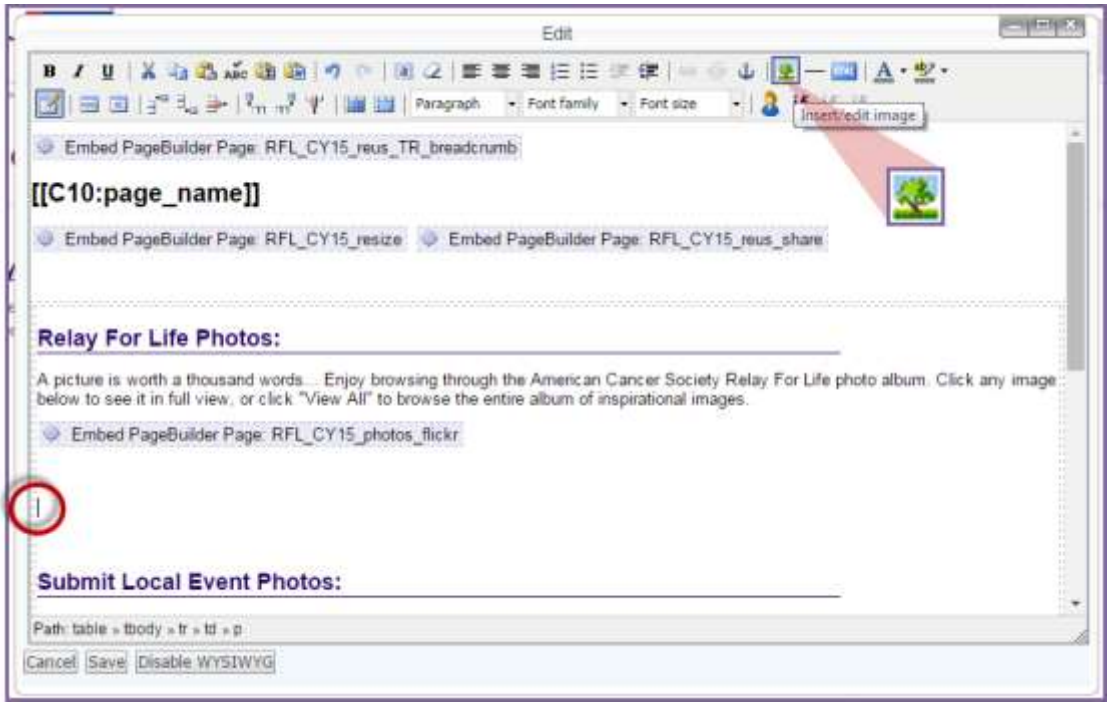
2. From the drop down menu, choose the webpage you'd like to edit.



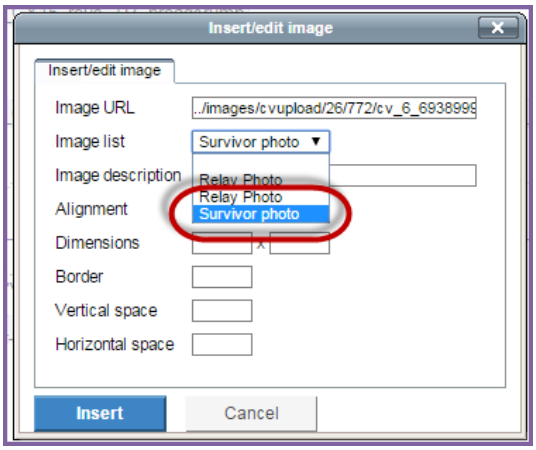
3. The page you wish to edit will appear below the drop down menu. To open the page for editing, selecting the small blue **Edit** box in the upper right hand corner.



4. Place curser at desired location on the webpage where you would like to add the picture.
    a. Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



    b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
    c. Select the image you wish to insert from those available in the drop down menu. Click **Insert**.
    d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.
    e. Once you save that page, the image will appear on the website.



Copy a Custom Page

While there are many pages already available on the website which you can edit and personalize, you may also create additional pages for new content and materials.

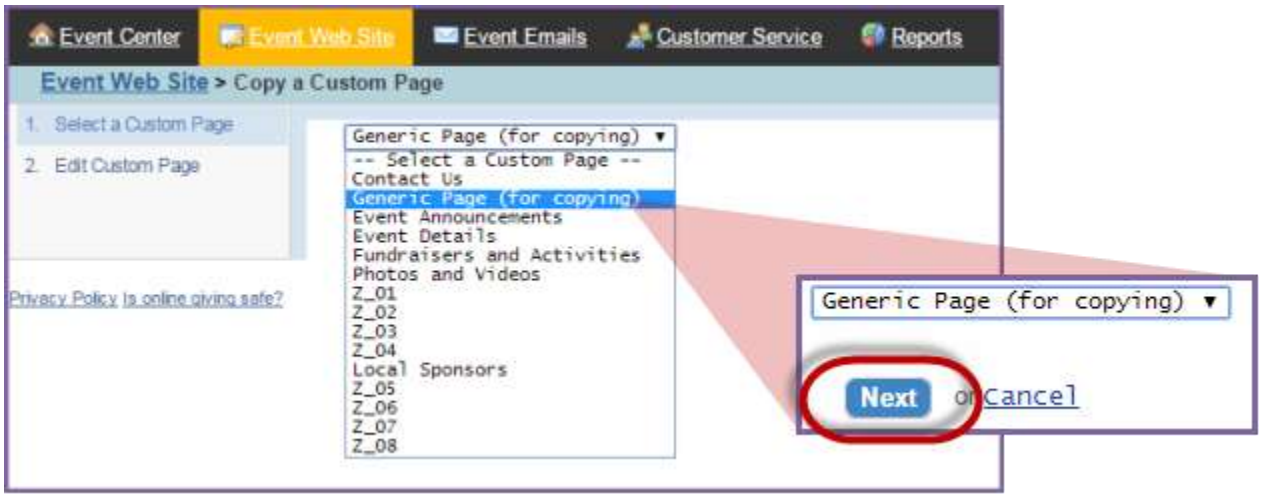
You may want to copy a custom page to mimic the look and feel of a pre-existing webpage. Once you copy a custom page, you may add your own text. The public will not see this newly created page until you add it to the Navigation Bar, or create a hyperlink on an existing page.

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

2. At the top of the page, select **Copy a Custom Page**.

3. **Select** an existing webpage whose format you wish to copy. We have provided a **Generic Page (for copying)** which will carry over all the proper coding and formatting so it matches the look and feel of the existing pages.

4. Click on the appropriate page from the dropdown menu before clicking **Next**.



5. Specify the following:
   a. **Page Name:** Change the name of the page from "copy of" to what you wish to name the new page.
   b. **Page Body**: Use the WYSIWYG tool bar to create and edit the content of the page.

6. When you have completed creating your new page, click **Save** and **Finish**.
   Be sure to save your work often!

*** Remember to add the page to the Navigation Bar so that your community can view the page you created. More information on how to update the Navigation Bar can be found later in this section of the Online Manual.*

Create a Custom Page

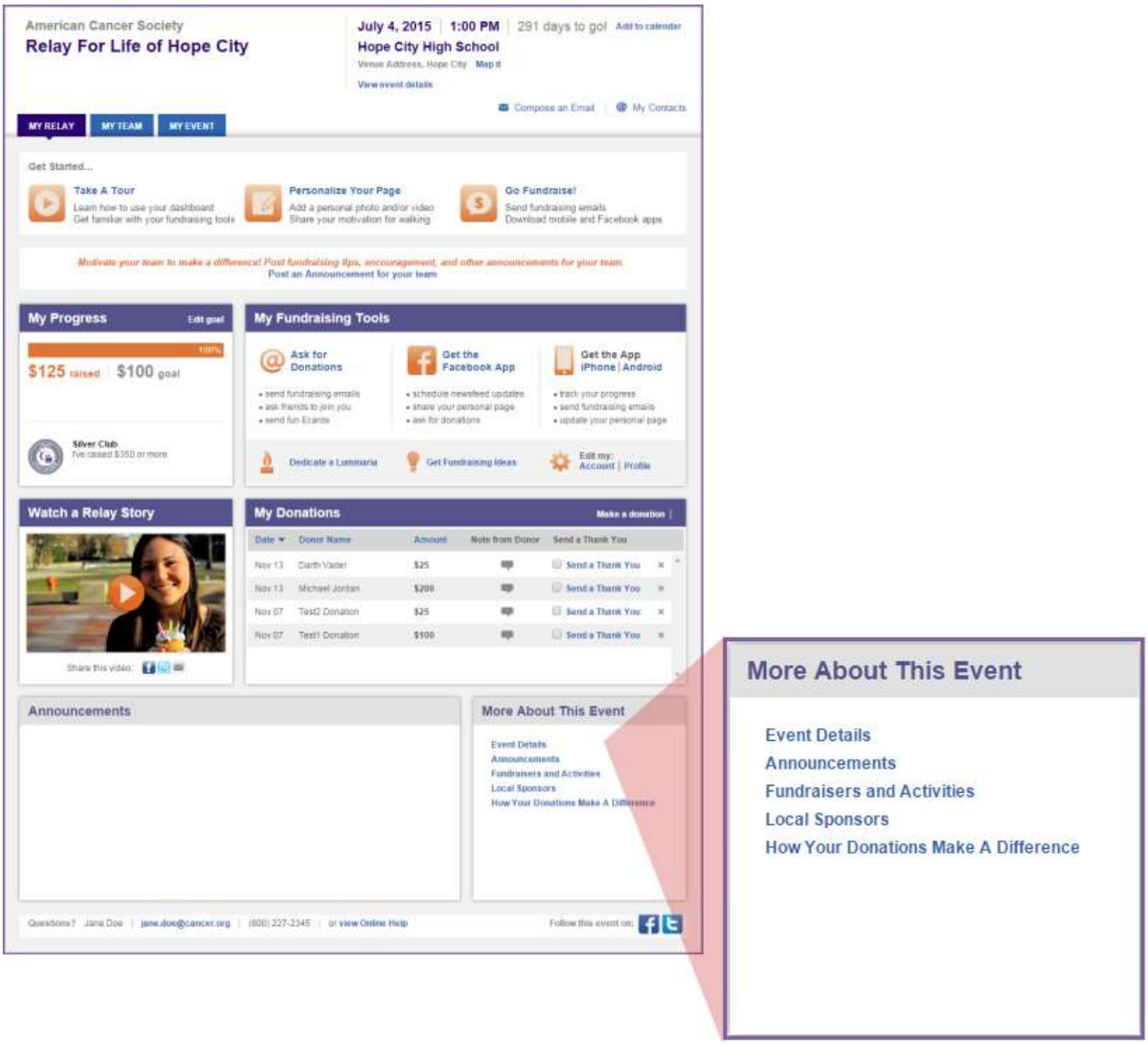
If you wish to create a custom page, you should follow the process outlined above for Copying a Custom Page, and select the **Generic Page (for copying)** - which will carry over all the proper coding and formatting so it matches the look and feel of the existing pages.

The Navigation Bar

The Navigation Bar may be found in the **My Relay** section of the Relay Dashboard and allow those registered and logged in participants to view a variety of pages with additional information and inspiration for the Relay For Life event.

The Online Chair may organize or add pages to the navigation bar throughout the Relay season in order to ensure that participants have access to necessary webpages to build towards a successful event.

After creating a webpage, you must add it to the Navigation Bar so that the link may be available for participants to view.

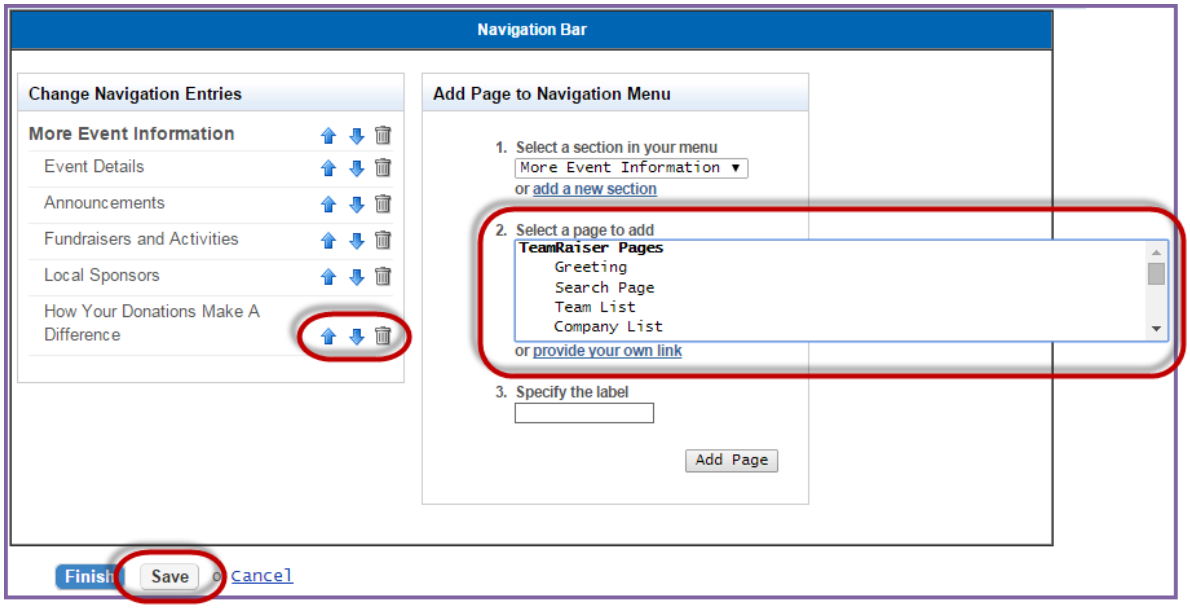


Setting Up the Navigation Bar

1. From the Event Manager Center, select the **Event Website** section from the top Navigation Bar.

2. At the top of the page, select **Configure Navigation Bar**.

3. Under **Change Navigation Entries**, review and make changes to how the pages appear in the Relay Dashboard navigation bar:



   a. To reorder the links within the navigation bar, click the up or down arrow beside the page title.
   b. To delete a link from the navigation bar, select the trashcan icon beside the page title. Confirm you would like to remove the item from the navigation bar. *If you delete a link from the navigation bar, you do not delete the webpage itself. You can find the page again under the "Add Page to Navigation Menu" section.*
   c. Additional pages may be added to the navigation bar through the **Add Page to Navigation Menu** area. To add a page, specify the following:
      1. **Select a section in your menu**: Ensure that the More Event Information section of the navigation bar is selected. No additional sections of the navigation bar may be created.
      2. **Select a page to add**: Choose a webpage to add to the navigation bar from the list provided. If desired, click **provide your own link** in order to enter a URL that may be linked to in the Relay Dashboard.
      3. **Specify the Label**: Enter the label of the page to help participants identify the link as it will appear in the Relay Dashboard navigation bar.
      4. Click **Add Page** and the link will then appear under the Change Navigation Entries section.

7. When you are finished adjusting or adding links to the navigation bar, click **Save** and then **Finish**. Once saved, the edited navigation bar will be reflected in the Dashboard for participants to view.

Chapter 5: Event Manager Center – Event Emails

- Basic Emails: Recruitment and Coaching messages
- Email "Rules"
    - Why event emails must be sent from the Relay Online Email Tool
    - ACS Privacy Policy
    - The CAN-SPAM Act
- Create and Customize a local email
- Copy a National Email Template to Customize
    - Customize your newly copied email message
- Insert Documents and Photos
    - Create a link to a document
    - Insert an image
- Send your local email
    - Send an Engagement Email to Current Event Participants
    - Send a Recruitment Email to Prior Event Participants
- Review a sent and scheduled messages

Basic Emails: Recruitment and Coaching Messages

Relay For Life email messaging is an essential component to building successful event and a positive volunteer relationship. An email campaign fosters great fundraising and team building plus community collaboration. This email campaign includes:

- Recruitment messages: Recruitment messages are emails sent to past participants or supporters encouraging them to register for Relay For Life.
- Engagement messages: Engagement emails are messages directed to registered participants for the purposes of encouraging their efforts, providing tips, and keeping them updated on event happenings.

Data shows that Relay For Life events that send regular recruitment emails and engagement emails to their community are more likely to raise more money, have more participants, and make a greater impact in the fight against cancer than those events that send fewer or less structured messages.

To ensure that relevant and timely emails are being sent to event participants there are four "registration triggered" email communications that will be sent on your behalf. These triggered autoresponders are sent a certain number of days after an individual registers online.

The timeline for the four emails are:

- Email 1: 5 days after registering
- Email 2: 19 days after registering
- Email 3: 27 days after registering
- Email 4: 40 days after registering

These four emails provide general tips and progress for participants to ensure that fundraising and team building messages are being shared throughout the season.

In addition to the four engagement autoresponders, it is important that event managers are sending additional localized Recruitment and Engagement emails. Make sure these emails are sent out on a consistent basis and are customized with encouraging and helpful information for event success! Be consistent and stay on top of your event email messages to ensure everyone is in the loop.

The following information will discuss how to use the email tool within the Event Manager Center to create your local email campaign.

See Appendix E: Online Email Campaign Best Practices for more information!

Email "Rules"

Why event emails must be sent from the Relay Online Email Tool

All emails that are sent to support a local Relay For Life event must be sent from the Event Management Center for the following reasons:

- Emails sent from the Relay website are 100% compliant with American Cancer Society privacy policy, US CAN SPAM Laws, spam filters, participant "do not mail" preferences.
- Once an email is sent from the Event Management Center, the Online Chair can track how many people open, read, click, register and donate through your emails.
- It's easy to stay in touch with everyone as the email tool automatically adds new participants to your website email groups.
- Links to your home page are added to those emails sent from the Online Email Tool; donors are participants don't have to search for your event homepage or remember a web address.
- Messages deliver current and consistent cancer information and mission delivery.

ACS Privacy Policy

The American Cancer Society respects constituents' privacy and allows individuals to restrict internal and external sharing of personal information. The Society recognizes that a constituent may wish to limit the ways in which the American Cancer Society and Relay For Life contact them and, therefore, offer the following options:

1. Do not contact me by telephone.
2. Do not contact me by postal mail.
3. Do not contact me by email.
4. Do not share my contact information with other non-profit organizations.
5. Do not contact me with fundraising requests supporting the American Cancer Society.
6. Limit your fundraising appeals to semiannual solicitations only.
7. Do not contact me or share my information with anyone.

For more information on how to inform the American Cancer Society of any desired restrictions, please click on the following opt out link: http://www.cancer.org/docroot/SU/content/SU_1_4_Opt_Out_Form.asp

If a constituent contacts the American Cancer Society with an opt-out request, all reasonable efforts will be taken to ensure that the individual will not receive any of the selected communications in the future. Updating communication preferences can be done at any time.

If a constituent opts back into a specific service, s/he will receive communication in that manner, regardless of the overall opt out selections. These services may include newsletter subscriptions or email communication by asking a question using "Contact Us."

Reference Link : http://www.cancer.org/docroot/SU/content/SU_1_4_Privacy_Statement.asp?sitearea=SU

The CAN-SPAM Act: Requirements for Emailers

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

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

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

What the Law Requires

The CAN-SPAM law requires that Relay For Life emails give recipients an opt-out method. The Online Manager must provide a return email address or another Internet-based response mechanism that allows a recipient to ask not to be sent future email messages to that email address; those requests must be honored. A "menu" of choices may be created to allow a recipient to opt out of certain types of messages, but the option to end any commercial messages from the sender must be included.

Any opt-out mechanism offered must be able to process opt-out requests for at least 30 days after the sent commercial email. The law gives Online Managers 10 business days to stop sending email to the requestor's email address. Another entity cannot send emails to that address. Finally, it's illegal to sell or transfer the email addresses of people who choose not to receive the organization's email, even in the form of a mailing list, unless transferring the addresses so another entity can comply with the law.

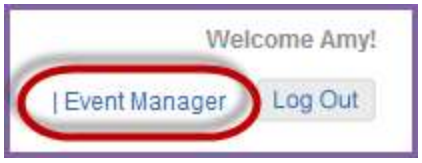
Reference Link: http://business.ftc.gov/documents/bus61-can-spam-act-compliance-guide-business

Event Emails – Create and Customize a New Email

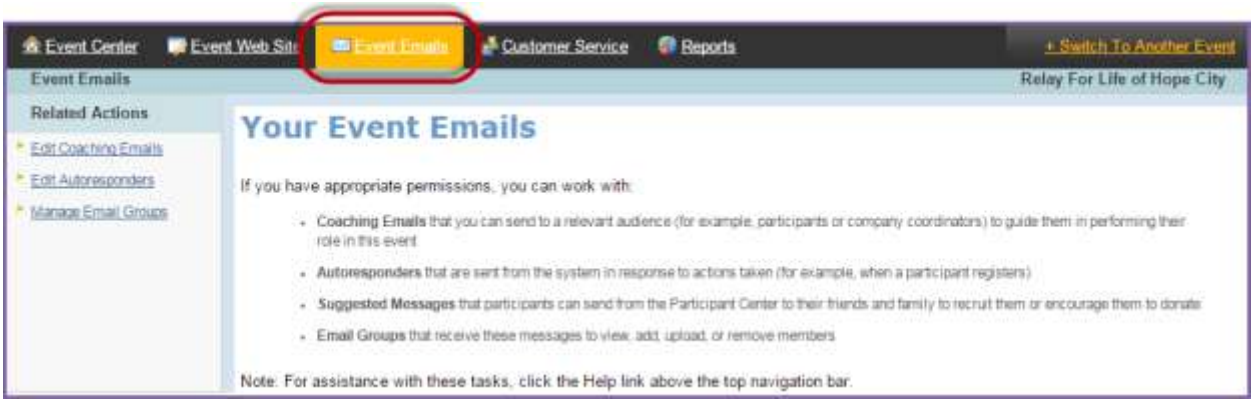
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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



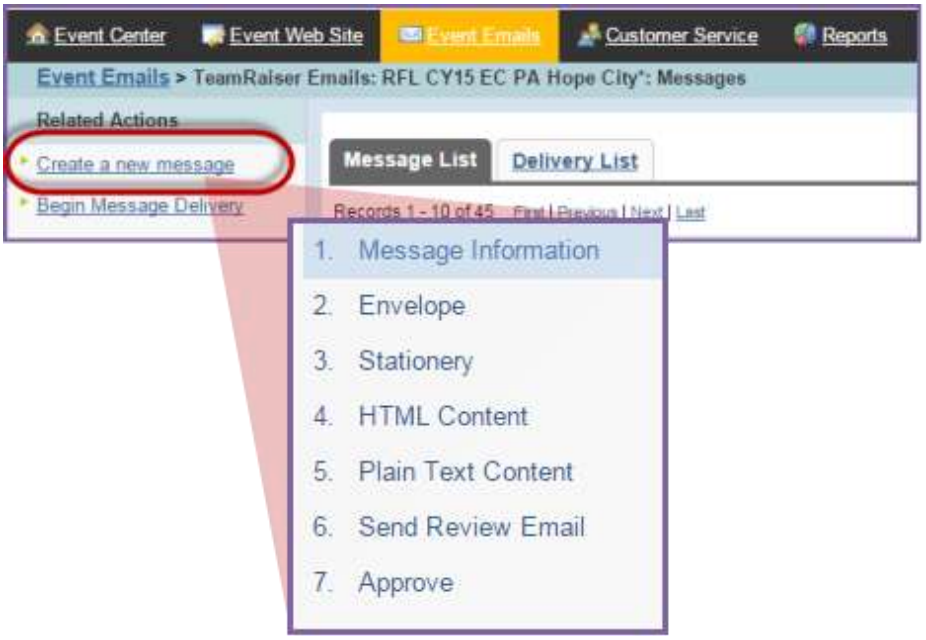
4. From the Event Management Center, click **Event Emails** in the top Navigation Bar.



5. Under Related Actions, select **Edit Coaching Emails**.

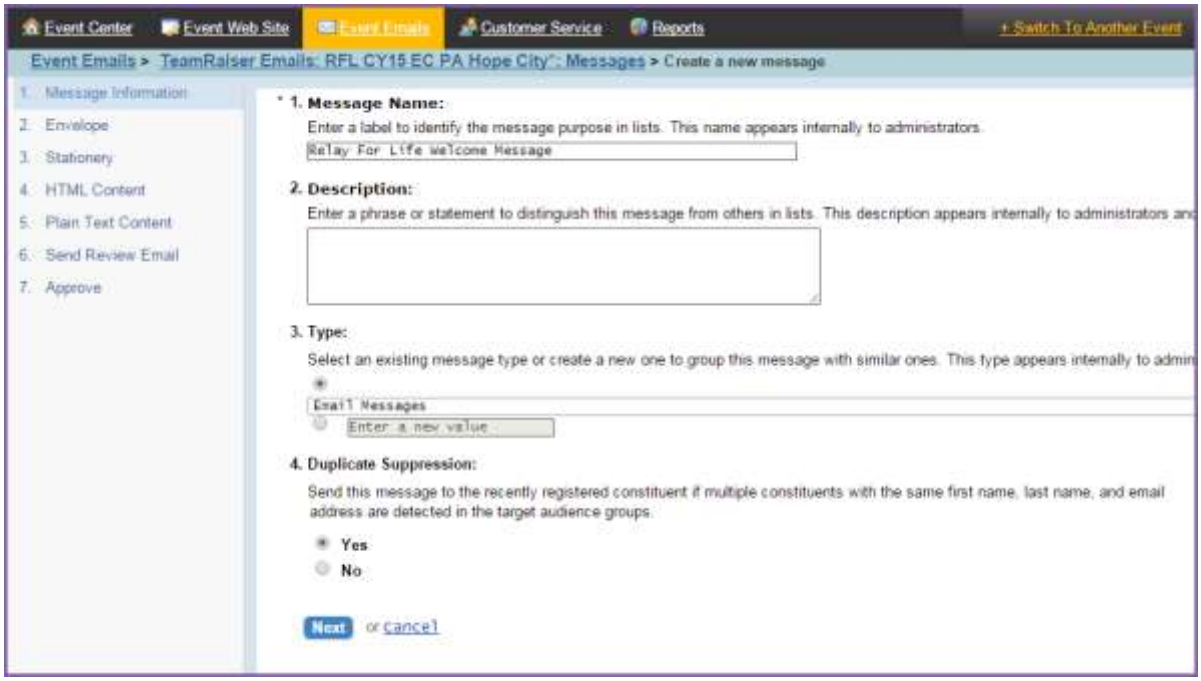
6. Click **Create a new message** from the Related Actions (left hand side of the page).

7. A **Process Navigator** is displayed on the left to guide you through the 7 step process of customizing your local email message.



a. **Step 1 – Message Information**: Specify the following information for internal identification of your message. Your recipients will not see this information. *(screen shot on following page)*

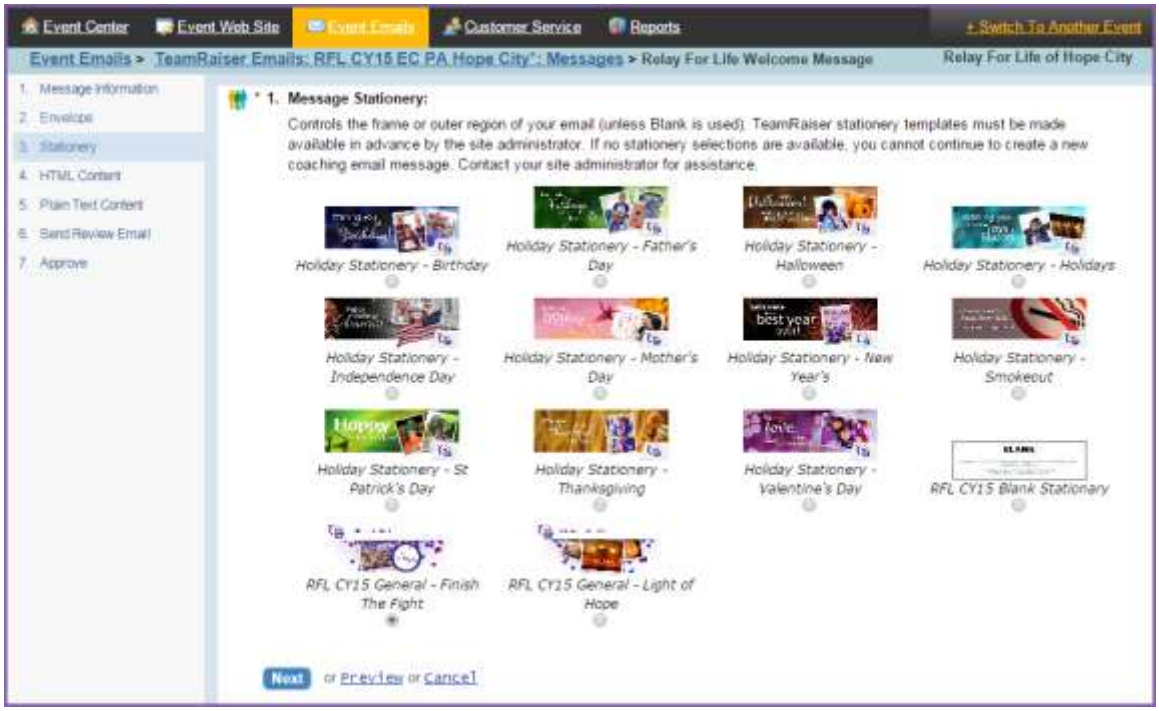
   i. **Message Name**: Enter a message name that will help uniquely identify the email when browsing the messages list of the Event Management Center. This field is required.
   ii. **Description**: Enter a brief statement about the email purpose.
   iii. **Select the message type**: If you wish to group similar messages together for organizational or reporting purposes, select a type of message from the drop down menu.
   iv. **Duplicate Suppression:** Always mark duplication suppression as **Yes**. This will ensure that individuals who are on multiple email lists will only receive one email if they have the same first name, the same last name, and same email address. This action is required.
   v. Click **Next**.



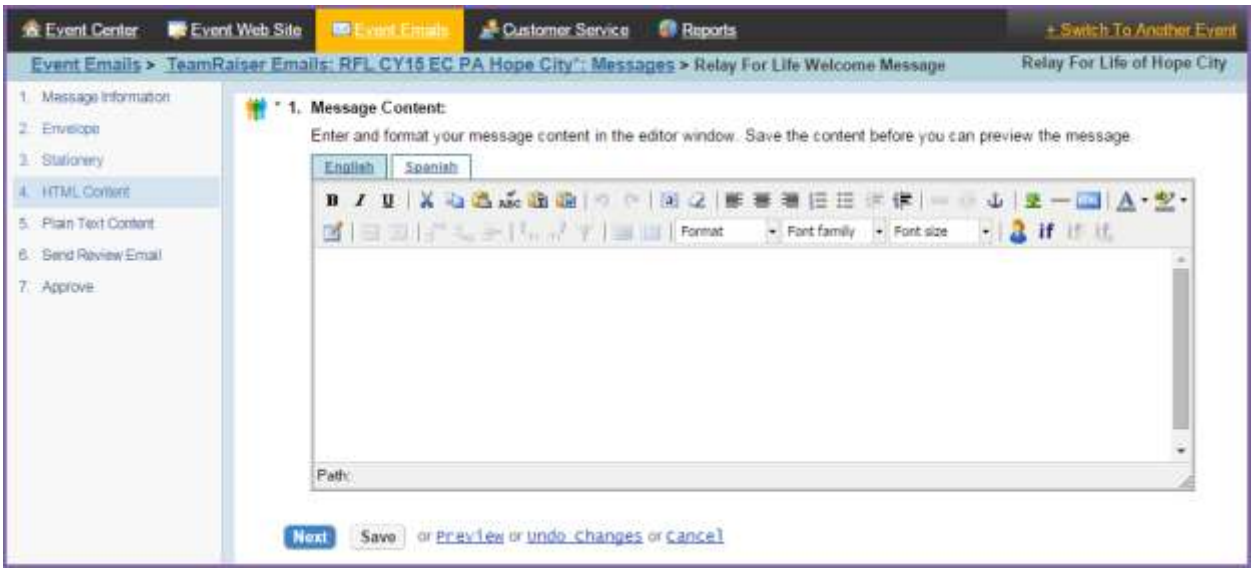
b. **Step 2 – Envelope:** Think of your own personal email inbox and how sender's information is shared. The "From" line (sender's name) and sender email address are important aspect of the email, as it gives the reader the first impression of the message. Specify the following information.

i. **Enter the sender's name**: Enter who the email is "from." It is recommended that the sender name follow the standard "Relay For Life of Community Name" in addition to any personalization.
ii. **Enter the sender's email address**: Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
iii. **Enter the subject line of this message**: Enter the phrase that you want recipients to see as the email subject. Keep subject lines short and sweet!
iv. Click **Next**.

c. **Step 3 – Stationery:** Select a stationary which will give each email a look or theme. After selecting your stationary, click **Next**.



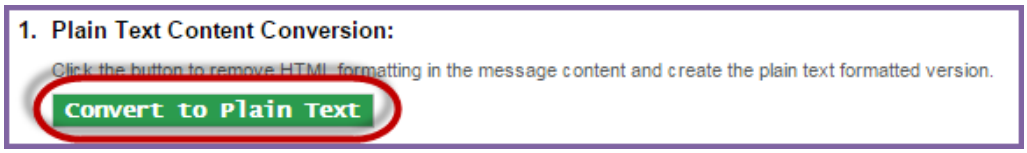
d. **Step 4 – HTML Content:** Use the WYSIWYG to create the content of your email.



i. Be sure to add links back to the Relay Online homepage so participants and donors can take action easily.
ii. Insert images, fun fonts, and different colors to make the email pop.
iii. Link to documents as a way to add more information.
iv. Click the **Preview** button to review the message layout and to check for typos and test links.
v. Once you have previewed and saved your message, click **Next.**

*** See the additional sections of this chapter for more information about adding images and links to the document. Additionally, view Appendix D for WYSIWYG basics.*

e. **Step 5 – Plain Text Content**: Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



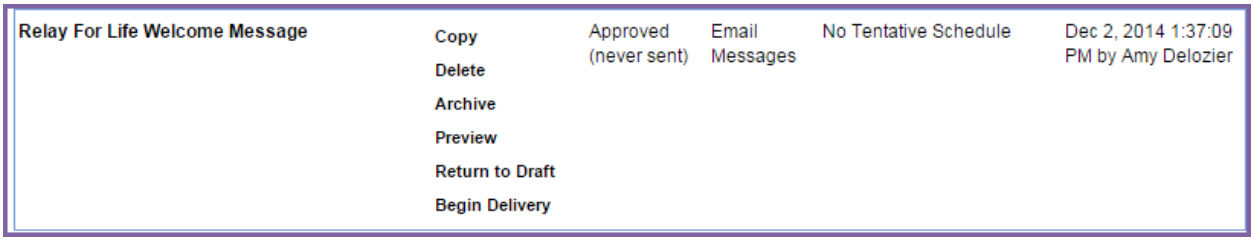
i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like "*Use the link below…*" if you have embedded a link behind some text.
ii. Click the **Preview** button to review the message layout and to check for typos and test links.
iii. Once you have previewed and saved your message, click **Next.**

f. **Step 6 – Send Review Email**: Decide who you wish to send a test message to and enter the email addresses into the open field. *Send a review email to your event chair, staff partner, English Teacher, Copy Writer, Newspaper Editor, Friend or Loved One. Another pair of eyes is key to proofreading typos.*

i. You should also click the box to send separate plain-text copy to your list of reviewers.
ii. It is recommended to send a test message to emails that use the major email providers like AOL, Yahoo, and MSN to ensure the emails can be received and viewed properly no matter what email service your recipients use.
iii. Click **Send Tests** to send the test copy before clicking **Next**.

g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send. A message cannot be sent until it is approved.

h. Click **Finish**.
i. After approving the email for delivery, you'll be returned to the **Message List**. From the Message List tab, you may review your message status and take additional actions.



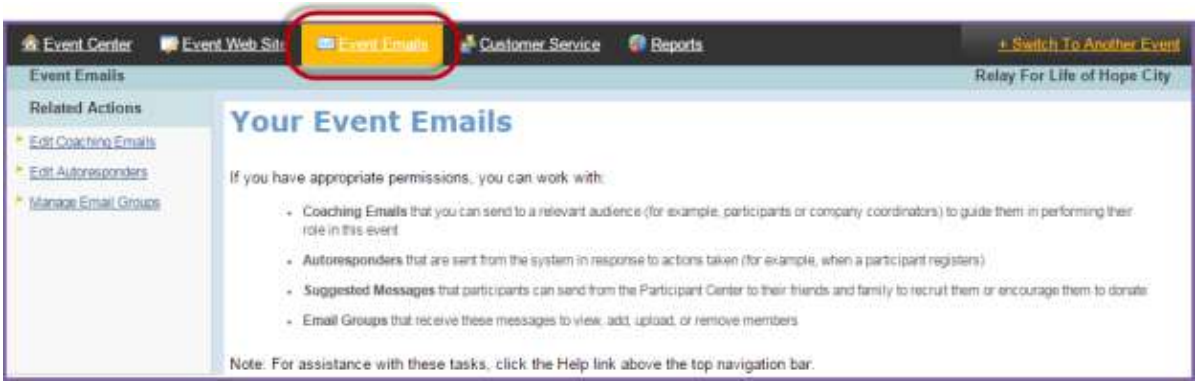
i. **Copy**: Copy the format of your message to create a new email with the same look and feel.

ii. **Delete** or **Archive**: Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the Event Manager Center.
iii. **Preview**: Preview the message in HTML and Plain text by clicking the Preview link.
iv. **Return to Draft**: Once an event has been approved, you can no longer edit it. However, by returning the email to a Draft state, the Online Chair can edit the content of the email.
v. **Begin Delivery**: Choose Begin Delivery to begin the process of sending your message to the proper recipients. More information about sending an email can be found later in this chapter.

Event Emails – Copy a National Email Template to Customize

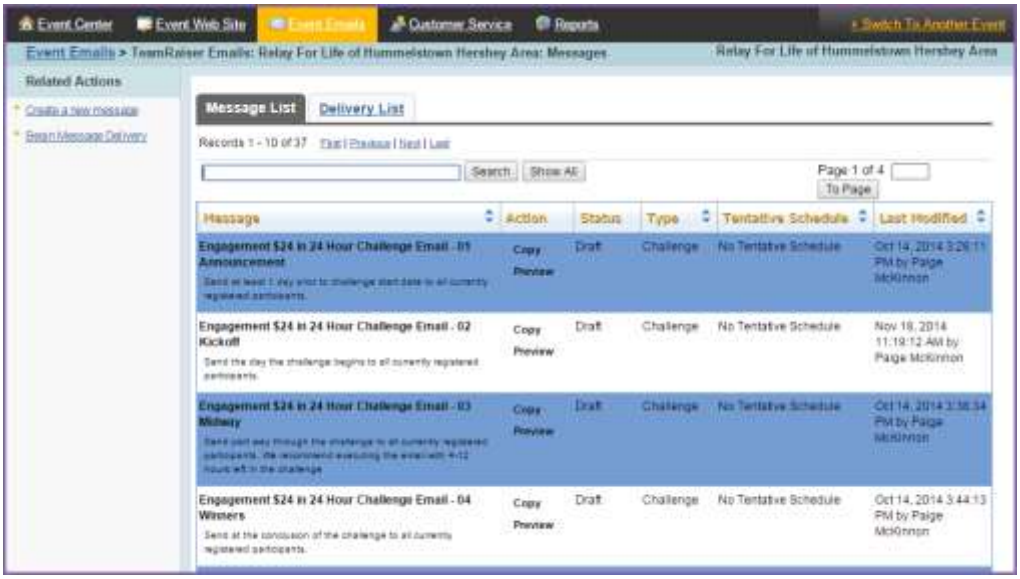
There are a variety of pre-written email templates available to you in your Coaching Email Center. You can send 'as is' or modify and add custom content. Either way, the email template must be copied and approved before you can send it.

1. From the Event Management Center, click **Event Emails** in the top Navigation Bar.

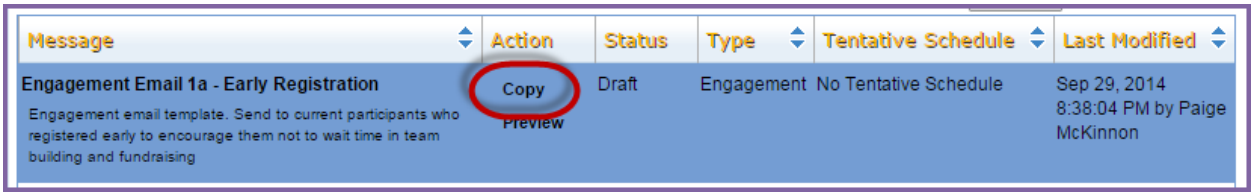


2. Under Related Actions, select **Edit Coaching Emails**.

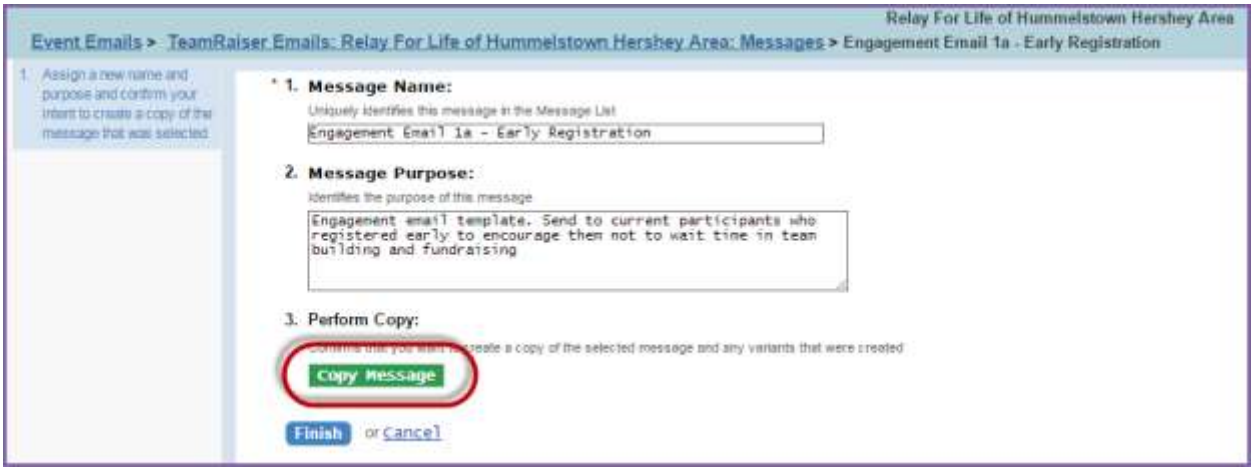
3. A list of all available email messages will display.



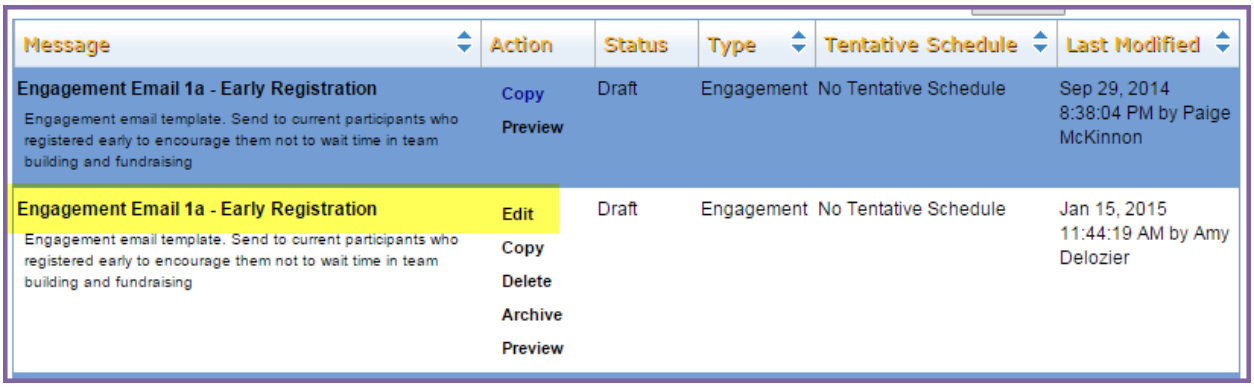
4. Find the email you wish to send in the list, and click **Copy** next to the message name.



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



6. Once your message has been copied, a new version will be available for editing. You can go through the steps and add custom content, photos, links, etc. prior to sending!

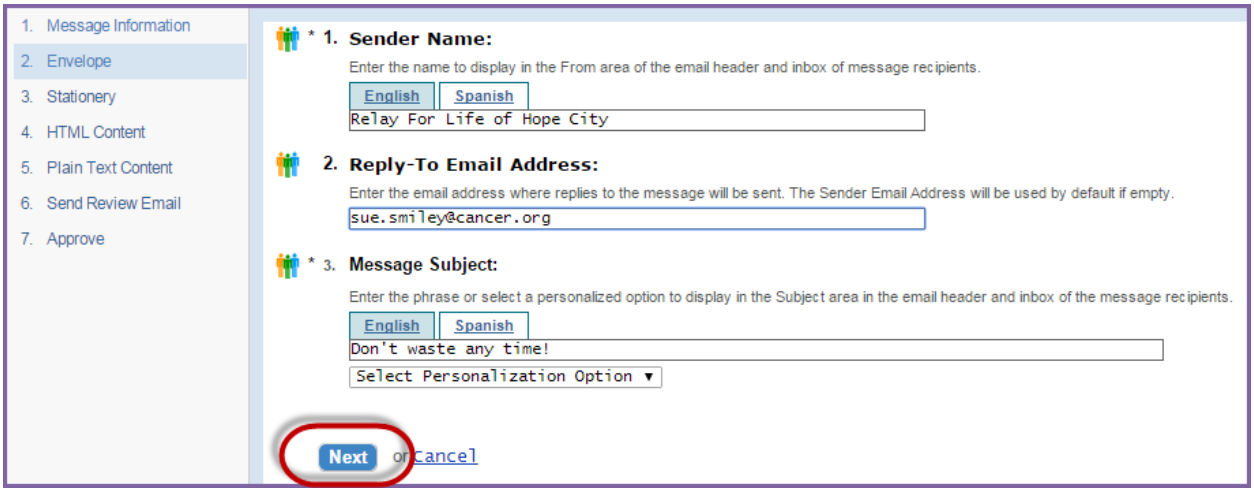


Customize your newly copied message

1. Find your newly copied email message in the list and click **Edit** next to the message name.

2. A **Process Navigator** is displayed on the left to guide you through the 7 step process of customizing your local email message.

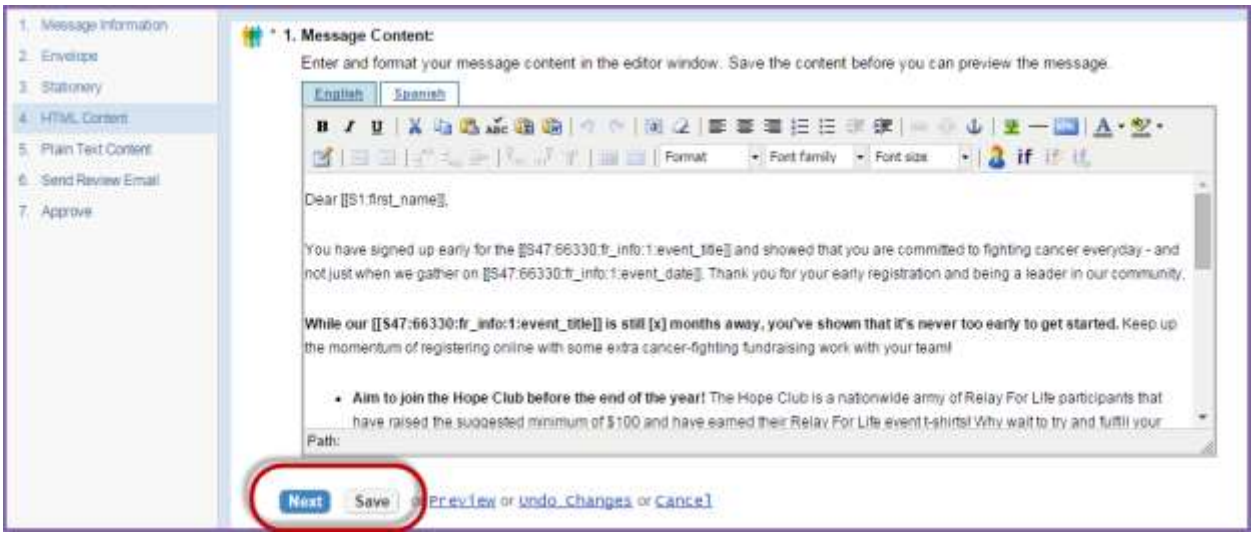
    a. **Step 1 – Message Information**: The email templates were all created with a specific naming convention, to allow for reporting on the success of the campaign. Please leave the message information 'as is.'
        i. Click **Next**.
    b. **Step 2 – Envelope:** Think of your own personal email inbox and how sender's information is shared. The "From" line (sender's name) and sender email address are important aspect of the email, as it gives the reader the first impression of the message. Specify the following information.



i. **Enter the sender's name**: Enter who the email is "from." It is recommended that the sender name follow the standard "Relay For Life of Community Name" in addition to any personalization.
ii. **Enter the sender's email address**: Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
iii. **Enter the subject line of this message**: The email templates already contain Subject Lines that match the email content. You can leave 'as is' or updated with your own. Keep subject lines short and sweet!
iv. Click **Next**.

c. **Step 3 – Stationery:** Select a stationary which will give each email a look or theme. After selecting your stationary, click **Next**.

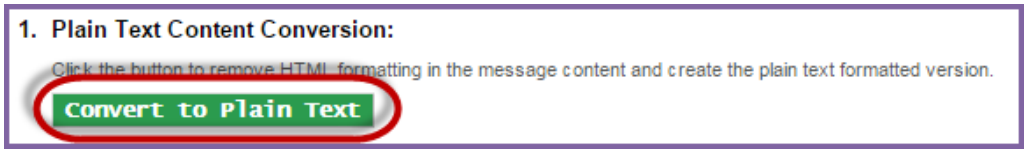
d. **Step 4 – HTML Content:** Use the WYSIWYG to add custom content to the email message.



i. Be sure to add links back to the Relay Online homepage so participants and donors can take action easily.
ii. Insert images, fun fonts, and different colors to make the email pop.
iii. Link to documents as a way to add more information.
iv. Do not edit or modify any text in the [[double brackets]] as those are text tags which will automatically pull in recipient name and event information.
v. Click **Save** often, so as not to lose your edits.
vi. Click the **Preview** button to review the message layout and to check for typos and test links.
vii. Once you have previewed and saved your message, click **Next.**

*** See the additional sections of this chapter for more information about adding images and links to the document. Additionally, view Appendix D for WYSIWYG basics.*

e. **Step 5 – Plain Text Content**: Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like "*Use the link below…*" if you have embedded a link behind some text.
ii. Click the **Preview** button to review the message layout and to check for typos and test links.
iii. Once you have previewed and saved your message, click **Next.**

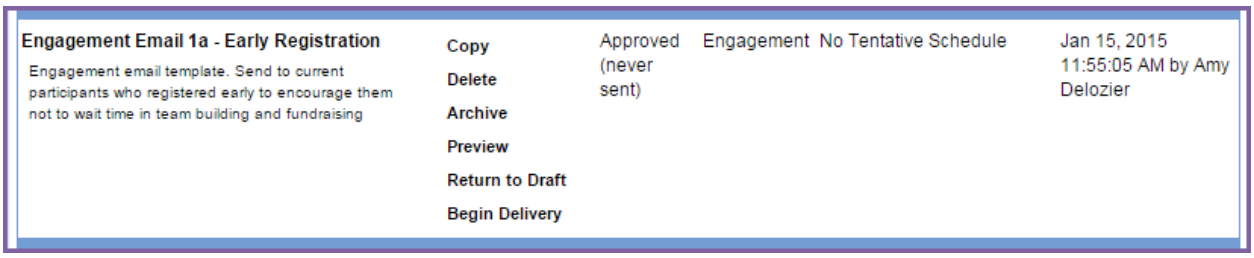
f. **Step 6 – Send Review Email**: Decide who you wish to send a test message to; enter the email addresses into the open field. *Send a review email to your event chair, staff partner, English Teacher, Copy Writer, Newspaper Editor, Friend or Loved One. Another pair of eyes is key to proofreading typos.*

i. You should also click the box to send separate plain-text copy to your list of reviewers.

ii. It is recommended to send a test message to emails that use the major email providers like AOL, Yahoo, and MSN to ensure the emails can be received and viewed properly no matter what email service your recipients use.
iii. Click **Send Tests** to send the test copy before clicking **Next**.

g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send. A message cannot be sent until it is approved.

h. Click **Finish**.



i. After approving the email for delivery, you'll be returned to the **Message List**. From the Message List tab, you may review your message status and take additional actions.
   i. **Copy**: Copy the format of your message to create a new email with the same look and feel.
   ii. **Delete** or **Archive**: Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the Event Manager Center.
   iii. **Preview**: Preview the message in HTML and Plain text by clicking the Preview link.
   iv. **Return to Draft**: Once an event has been approved, you can no longer edit it. However, by returning the email to a Draft state, the Online Chair can edit the content of the email.
   v. **Begin Delivery**: Choose Begin Delivery to begin the process of sending your message to the proper recipients. More information about sending an email can be found later in this chapter.

Insert Documents and Photos

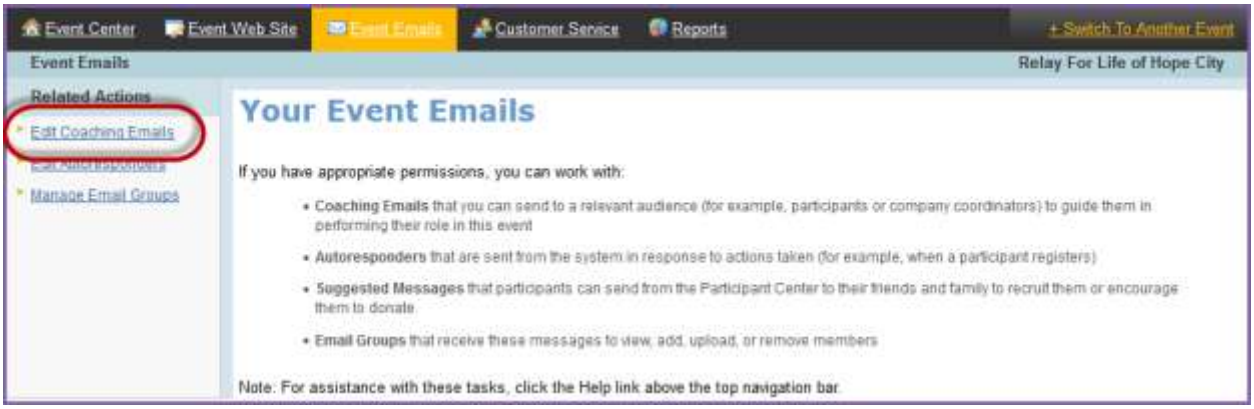
You can add localized photos and documents to your event emails. They must be added to the Event Library prior to inserting into your email messages. See chapter 3: Manage Event Library for helping adding photos and documents to your library.

Insert a Document Link into an Email

While creating and customizing local Relay For Life emails, you may insert a document into the body of the message. Unlike using your personal email system in which a file can be added as an attachment, adding a document to an email sent from the Event Management Center means creating a hyperlink to any document that has been uploaded into the Event Library.

1. From the Event Management Center, select the **Event Emails** section from the top Navigation Bar.

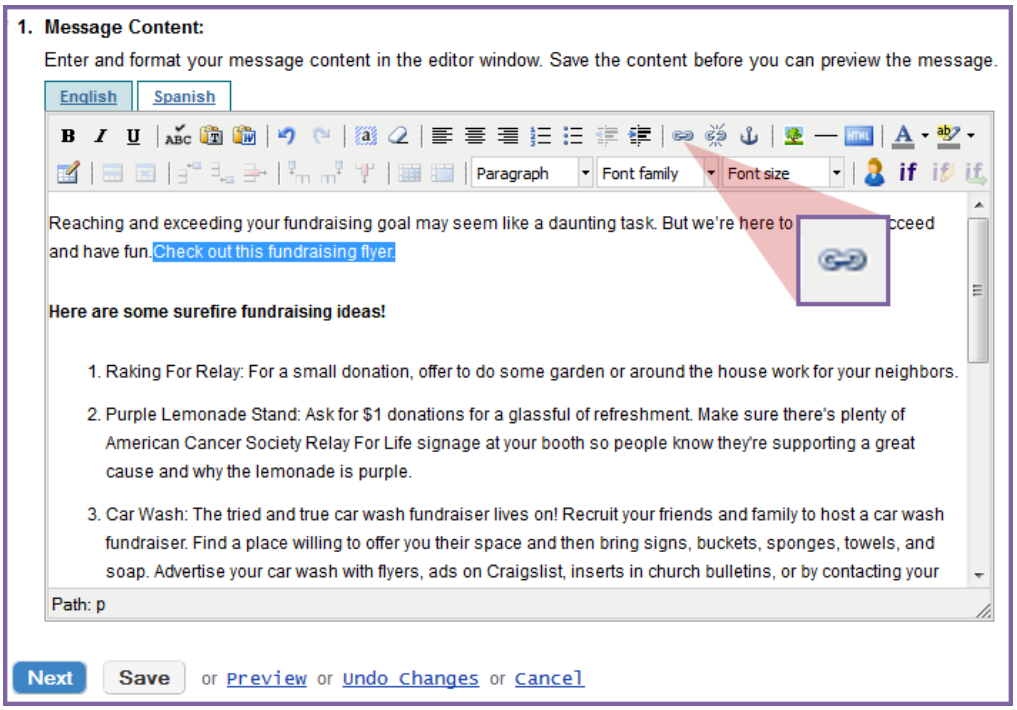
2. Under **Related Actions** (left hand side of the page), choose **Edit Coaching Emails** to find the email you wish to edit.



3. Follow the necessary steps to create and edit the email you wish to add the document to.

4. On step **4. HTML Content**, create your desired link text by typing directly onto the email (i.e. View the flyer here).

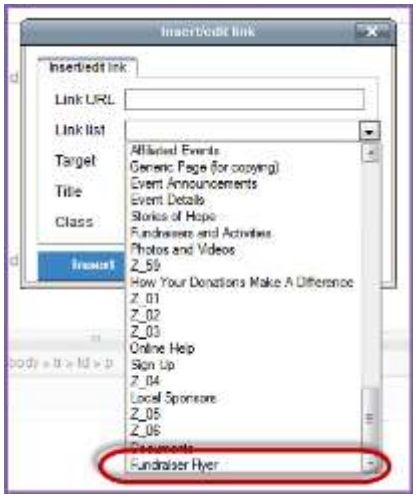
5. Highlight the text you'd like to be a link, then click the **Insert/Edit Link** button from the WYSIWYG tool bar.



6. From the link drop down menu, all the way at the bottom of that list, you'll find all the documents you have uploaded in your document library.

7. Select the document you want to insert from those available in the drop down menu.

8. Change the **Target** to **Open link in a new window**, so site visitors are not directed away from your website when they click the document link.



9. Click **Insert**.

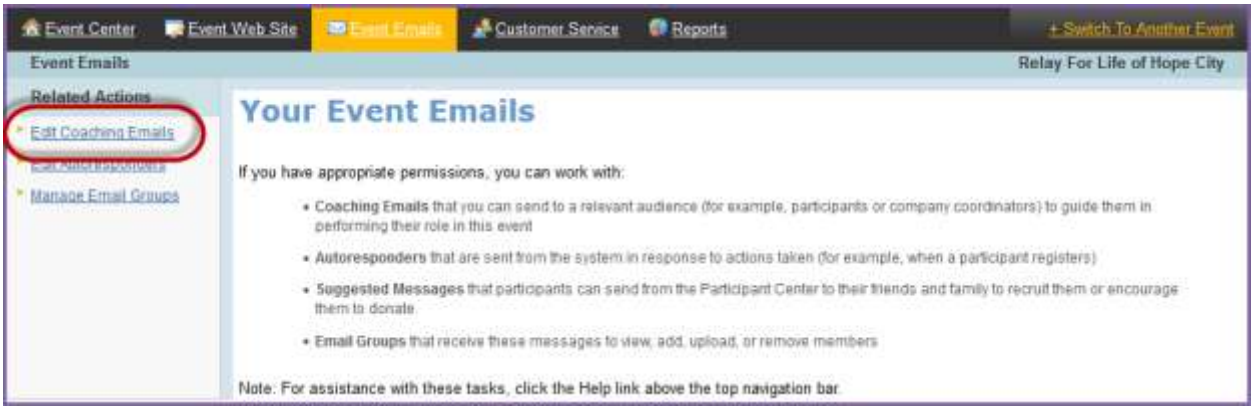
10. Once you save that email, the highlighted words will become a link to the document.

Insert an Image into an Email

While creating and customizing local Relay For Life emails, you may insert an image into the body of the message. This can be done by add any picture that has been uploaded into the Event Library to the email.

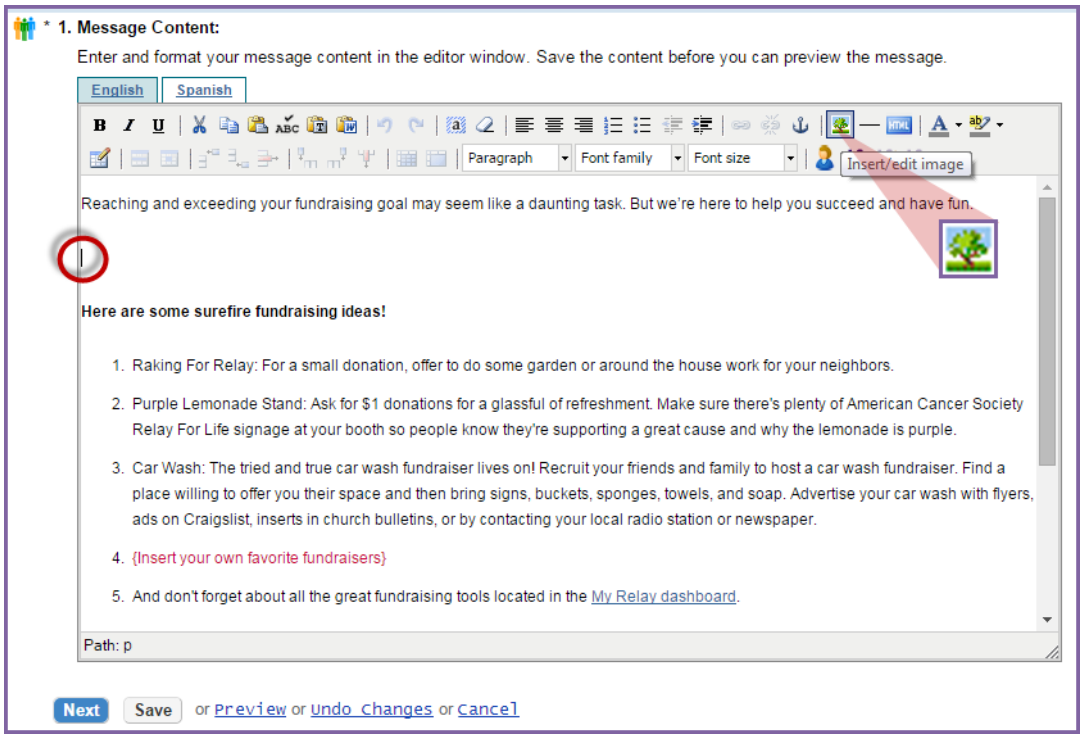
1. From the Event Management Center, select the **Event Emails** section from the top Navigation Bar.

2. Under **Related Actions** (left hand side of the page), choose **Edit Coaching Emails** to find the email you wish to edit.

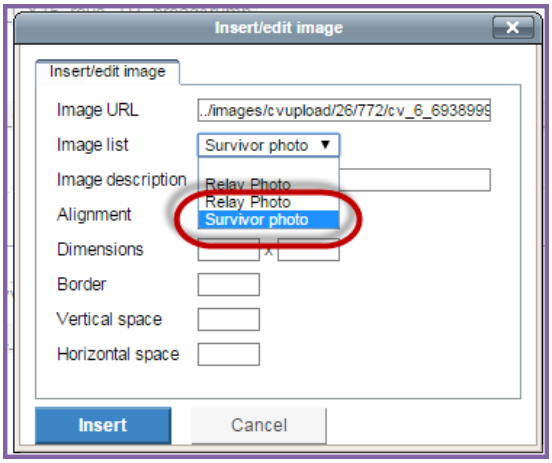


3. Follow the necessary steps to create and edit the email you wish to add the image to.

4. On step **4. HTML Content**, place your curser at desired location in the email where you would like to add the picture.
    a. Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
c. Select the image you wish to insert from those available in the drop down menu. Click **Insert**.
d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.
e. Once you save that page, the image will appear on the website.



Event Emails – Send your Local Message

After creating, customizing, and approving your local email, follow the necessary steps to see the message delivered to the appropriate individuals.

1. From the Event Management Center, select the **Event Emails** section from the top Navigation Bar.

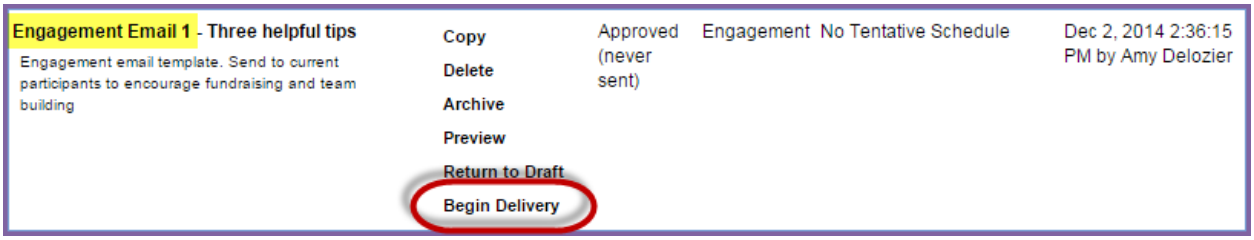
2. Under Related Actions (left hand side of the page), select **Edit Coaching Emails**.

3. From the Message List tab, locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

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

Send an Engagement Email to Current Event Participants

An Engagement Email is used to 'engage' your currently registered participants. You can use send an engagement email to welcome participants to Relay, notify them of upcoming meetings, send fundraising tips, and event logistics.



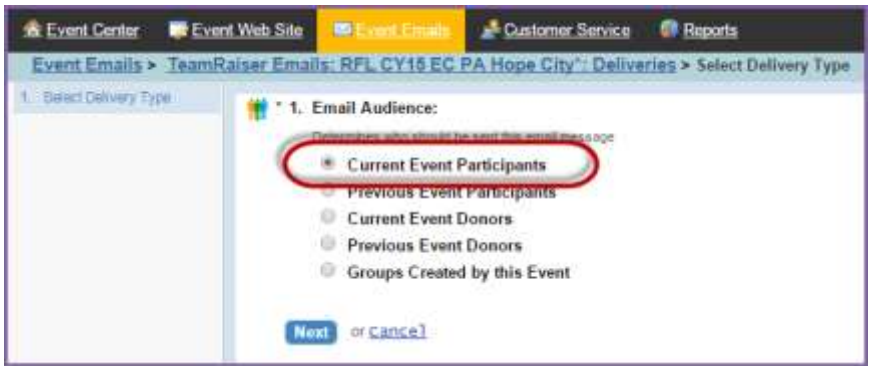
1. From the Message List tab, locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

2. Select the **audience** who are to receive this email.

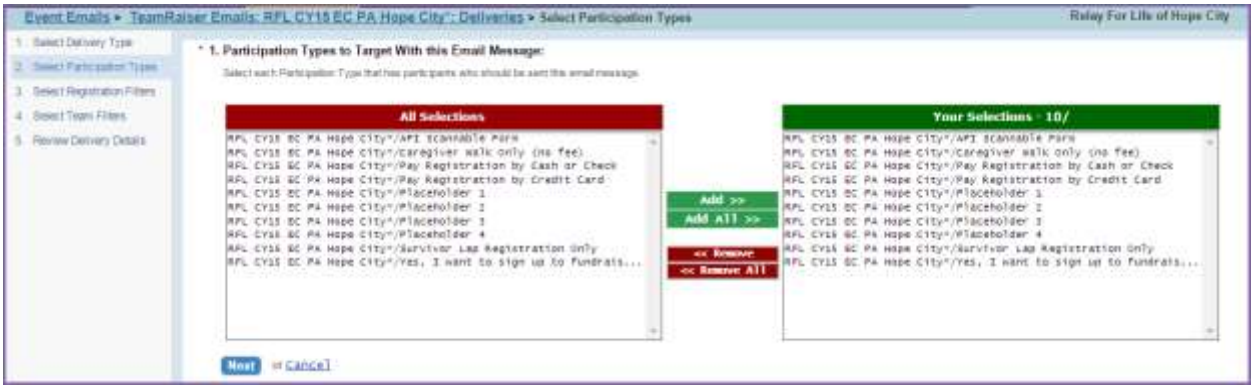
3. When sending an Engagement Email Message, select **Current Event Participants**. (If you are sending a "Recruitment" email, please go to page 130 for step-by-step instructions.)

   - **It's important you never select the Current or Previous Event Donors for your email audience.** Those contacts were 'recruited' by the family and friends they donated to, and we (ACS) shouldn't step in and intercede. The participants should continue to maintain the relationship with donors.

4. Click Next.



5. Select Participation Types:
   a. Highlight the group you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.
   b. Add the appropriate groups to the green **Your Selections** box.
   c. To select multiple groups, hold **CTRL** as you select two or more groups.
   d. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.



6. Apply any optional filters on the recipient list. Filters allow you to narrow the email recipient list by a number of factors such as team captain status or registration date.

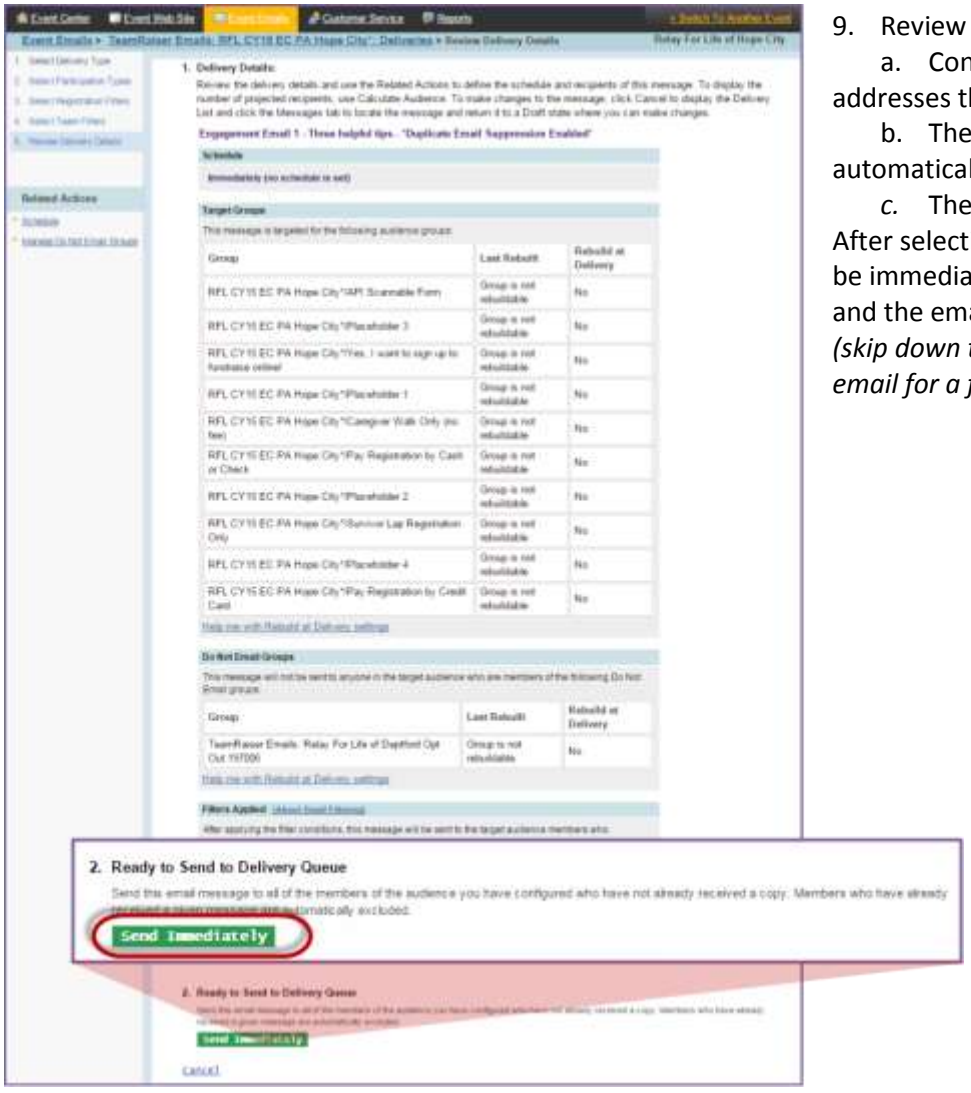
7. Registration Filters:
   a. No action is required in this step.
   b. If you do wish to apply a registration filter, select from the available Registration Filter options:

i. **Previous Event Participation Filter:** Filter the currently registered participant recipients of the email to whether or not they participated in the past.
ii. **Online/Offline Registration Filter:** Allow the email to be sent to both online and offline registrants.
iii. **Date Range:** Choose to filter the email recipients based on when they registered.

c. Click **Next**

8. Team Filters:
   a. No action is required in this step.
   b. If you do wish to apply a team registration filter, select from the available Team Filter options:
      i. **Team Membership Filter:** Identify if you wish to filter the currently registered participant email recipients by team captains, team members, or individual walkers.
      ii. **Company Affiliation Filter:** Filter the email list further by the participants' corporate affiliation.
   c. Click **Next**

Tip: if you wish to send a message to Team Captains Only (for example: meeting notices), make sure only the "Team captain" box is checked so that the message will be sent to Team Captains registered for your event.



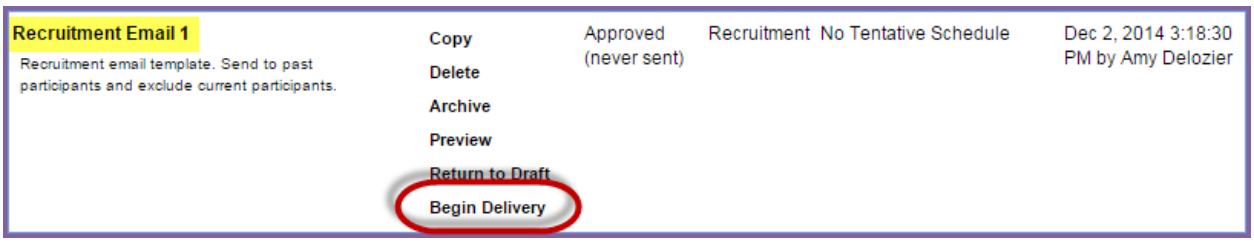
9. Review Delivery Details:
   a. Confirm the **target groups** are the email addresses that you wish to send the message to.
   b. The Unsubscribes or Opt Outs are automatically included in the **Do Not Mail List**.
   c. The Final Step is to click **Send Immediately**. After selecting Send Immediately, the message will be immediately delivered to the recipients' inboxes and the email process will have been completed. *(skip down to d. if you would prefer to schedule your email for a future date/time)*

d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click **Schedule**.

i. Select the **date** and **time** you would like the message to be sent. ***Note**: All times are set to Central Standard Time.*
ii. Click **Finish.**
iii. Finally, return to the email delivery page and click **Send At Scheduled Time**. This places the message in a queue to be sent at scheduled date and time. This completes the email process.

Send a Recruitment Email to Prior Event Participants

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

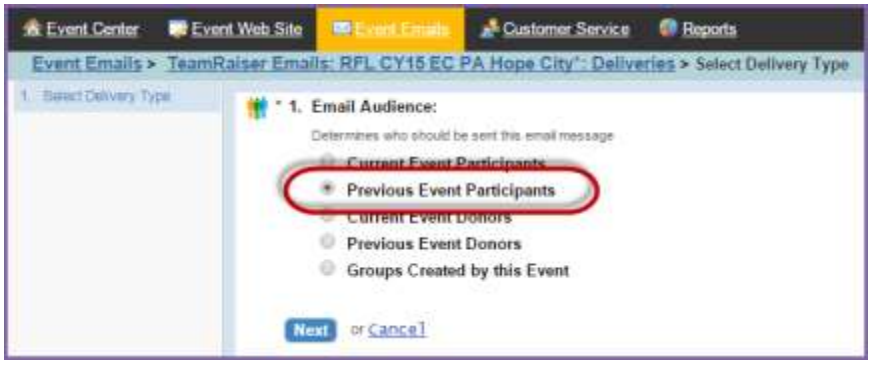


1. From the Message List tab, locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

2. Select the **audience** who are to receive this email.

3. When sending a Recruitment Email Message, select Previous **Event Participants**.

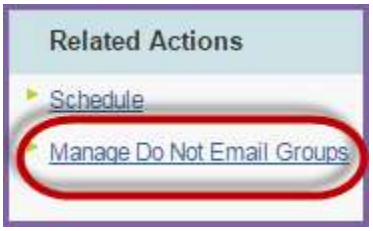
   ❖ **It's important you never select the Current or Previous Event Donors for your email audience.** Those contacts were 'recruited' by the family and friends they donated to, and we (ACS) shouldn't step in and intercede. The participants should continue to maintain the relationship with donors.



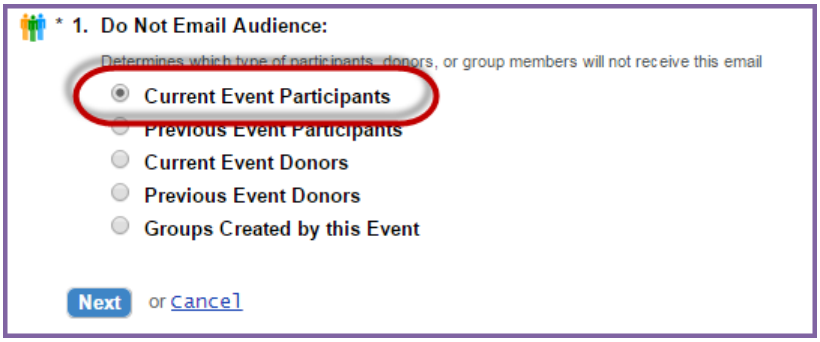
4. Click Next

5. Select Previous Event Participation Types:
   a. Highlight the prior event participation types you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.
   b. Add the appropriate groups to the green **Your Selections** box.
   c. To select multiple groups, hold **CTRL** as you select two or more groups.
   d. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.

6. Review Delivery Details: ***For Recruitment Emails, you MUST set up the current event participants as a 'Do Not Email' group*** – *since they are already registered and we do not want to invite them again!*
    a. From the message review page, click the link **to Manage Do Not Email Groups** under Related Actions on the left.



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



8. Click **Next**

9. Select Do Not Email Groups: Click **Exclude All >>** This will ensure that everyone already registered for your event will not receive an email asking them to register again.
    a. Click **Exclude All>>**
    b. Click **Finish**

10. Review Delivery Details:
    a. Confirm the **target groups** are the email addresses that you wish to send the message to.
    b. The Unsubscribes or Opt Outs are automatically included in the **Do Not Mail List**. Make sure that all your **current event participation types** are also included in the Do Not Mail List.
    c. The Final Step is to click **Send Immediately**. After selecting Send Immediately, the message will be immediately delivered to the recipients' inboxes and the email process will have been completed.
    d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click **Schedule**.
        i. Select the **date** and **time** you would like the message to be sent. ***Note****: All times are set to Central Standard Time.*
        ii. Click **Finish.**

iii. Finally, return to the email delivery page and click **Send At Scheduled Time**. This places the message in a queue to be sent at scheduled date and time. This completes the email process.

Event Emails – Review Sent and Scheduled Messages

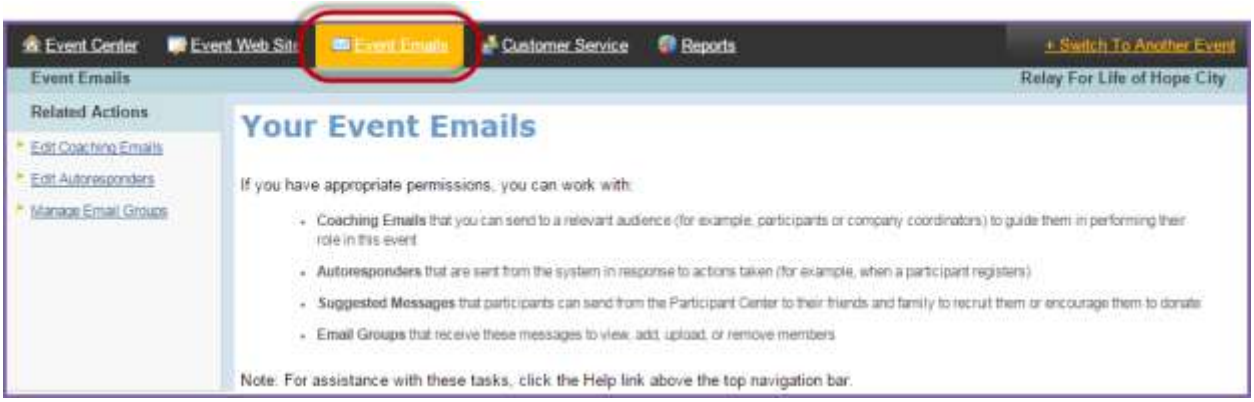
Review all the emails that are being received by your Relay community, from the basic recruitment and engagement messages to the additional local emails you schedule. The **Delivery List tab** of the Coaching Emails section will provide data on when emails were sent or are scheduled as well as the performance of each message.

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

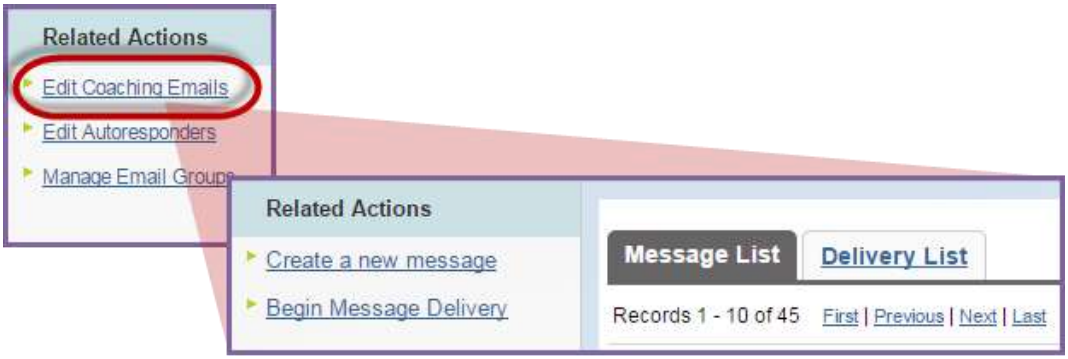
3. Click the **Event Manager** link on the top right side of the page.

4. From the Event Management Center, click **Event Emails** in the top Navigation Bar.



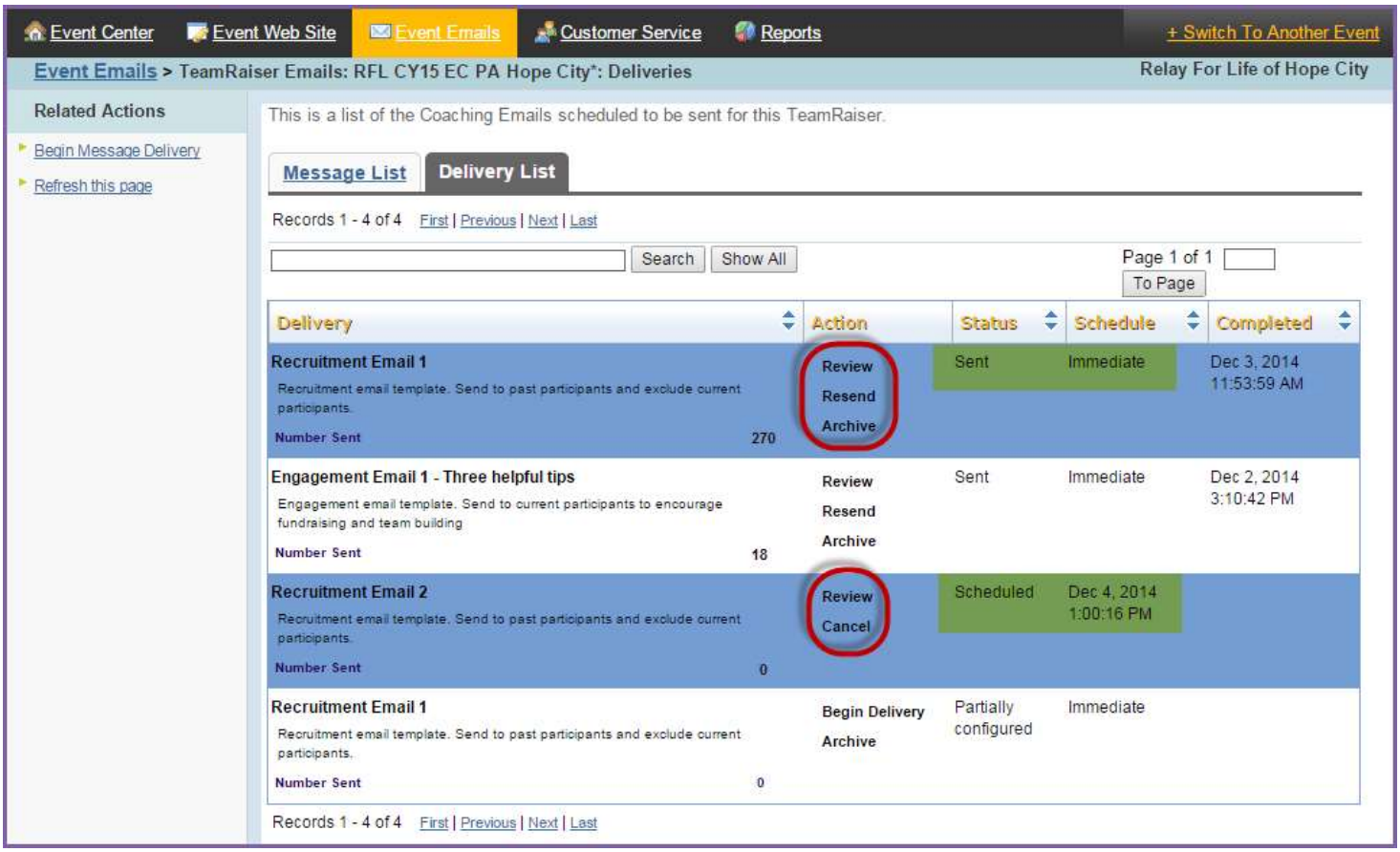
5. Under Related Actions, select **Edit Coaching Emails**.

6. All event emails are divided between two tabs.



a. **Message List** tab: From the message tab, you may create new localized emails.
b. **Delivery List** tab: Review the sent and scheduled event messages including those sent locally or as a part of the centralization email process.

7. From the Delivery List tab, you can:



a. Review the **Status** of your message as Sent or Schedule. The date of those deliveries or scheduled deliveries will appear in the **Schedule** and **Completed** columns.
b. For Sent emails:
    i. After the message has been sent, the **Open** and **Click Rates** of your message will allow you to monitor the success of each communication.
    ii. Click **Review** to get further details on the delivery of the email.
c. For Scheduled emails:
    i. After the message has been scheduled, you may review when the message is set for delivery.
    ii. Click **Cancel** to stop the message from being delivered or to change the delivery date/time.

Chapter 6: Customer Service – Manage Participants

- Search for Participants
- View a Participant's Gift History
    - Change the Honor Roll Name on a Participant's Page
    - Move the Credit of a Donation to Another Participant
    - Refund a Donation
- Edit the Registration Information of a Participant
    - Update a Participant's Basic Registration Information
    - Delete a Participant's Online Registration
    - Make a Participant's Webpage Private
- Edit the Team Information of a Participant
    - Move a Participant to a Team
    - Create a New Team with a Participant as Team Captain
    - Promote or Demote Team Members and Team Captains

As your community's Relay For Life Online Chair, you are able to provide a great deal of constituent support to registered participants. Through the Event Management Center, you may find the tools available to you to address questions and provide participants with a smooth experience to fundraise and build their team.

Search for Participants

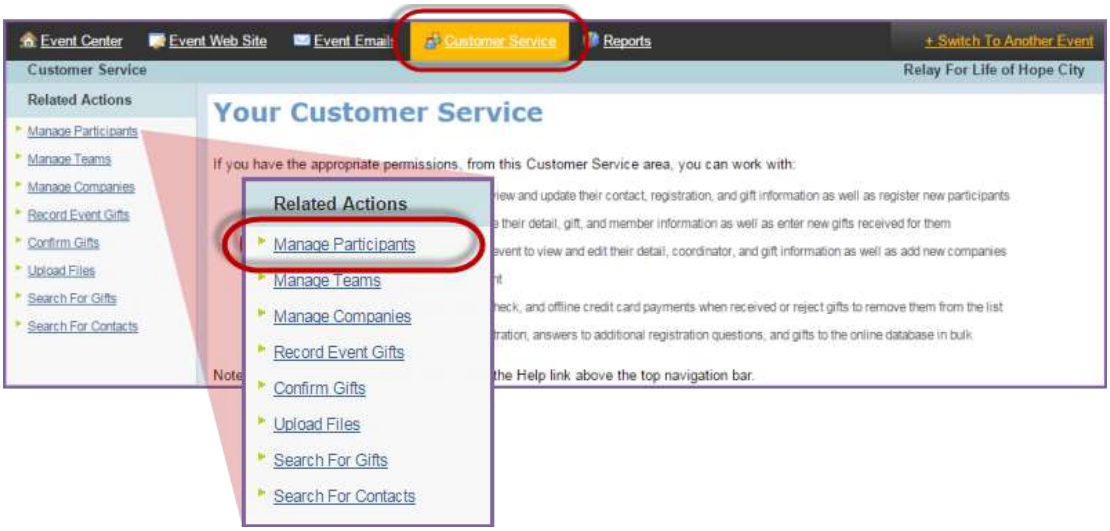
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

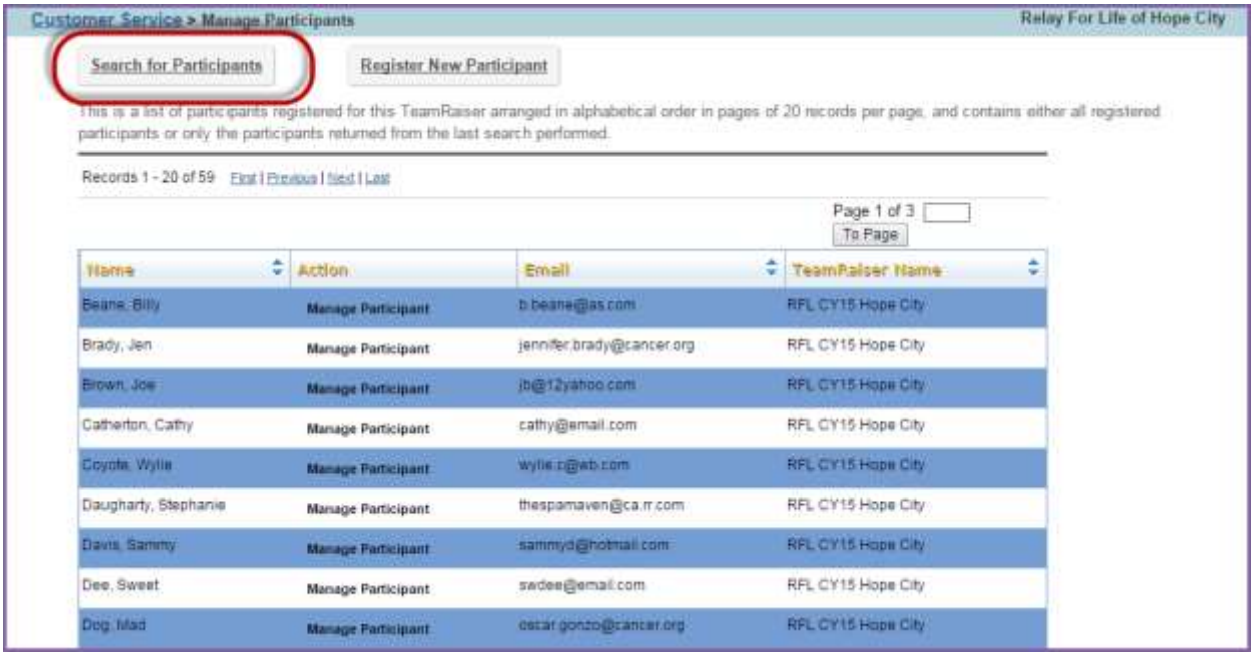
3. Click the **Event Manager** link on the top right side of the page.

4. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

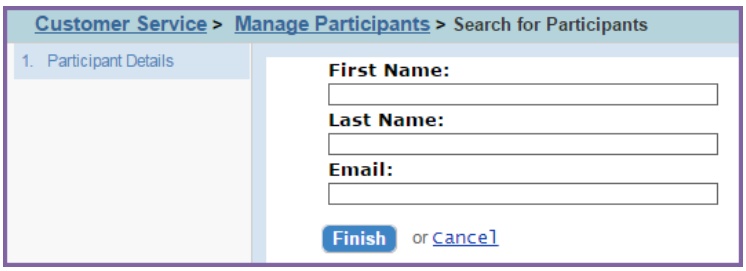
5. Under Related Actions, select **Manage Participants**.



6. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

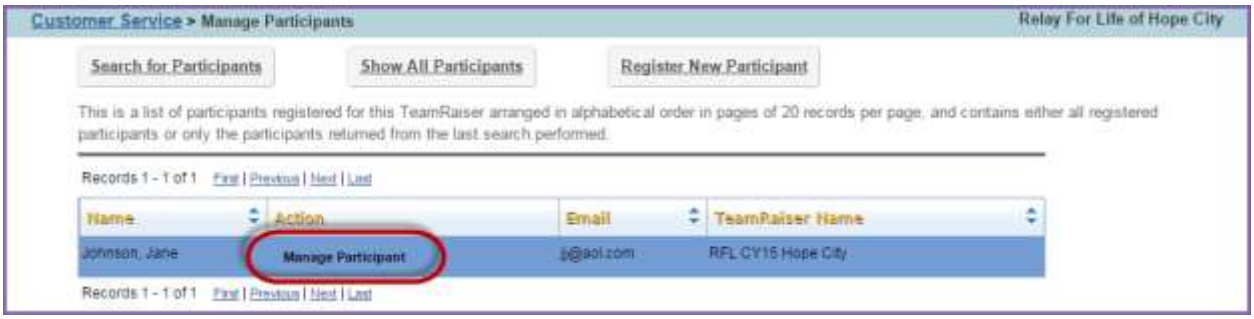


a. To search for a participant, enter first name, last name, and/or email address in the search fields before clicking **Finish**.



*TIP: Use % for wildcard. Example: **Jon%** if you are trying to find Jon or Jonathon.*

7. Beside the participant's account, click **Manage Participant** to access the participant's profile.

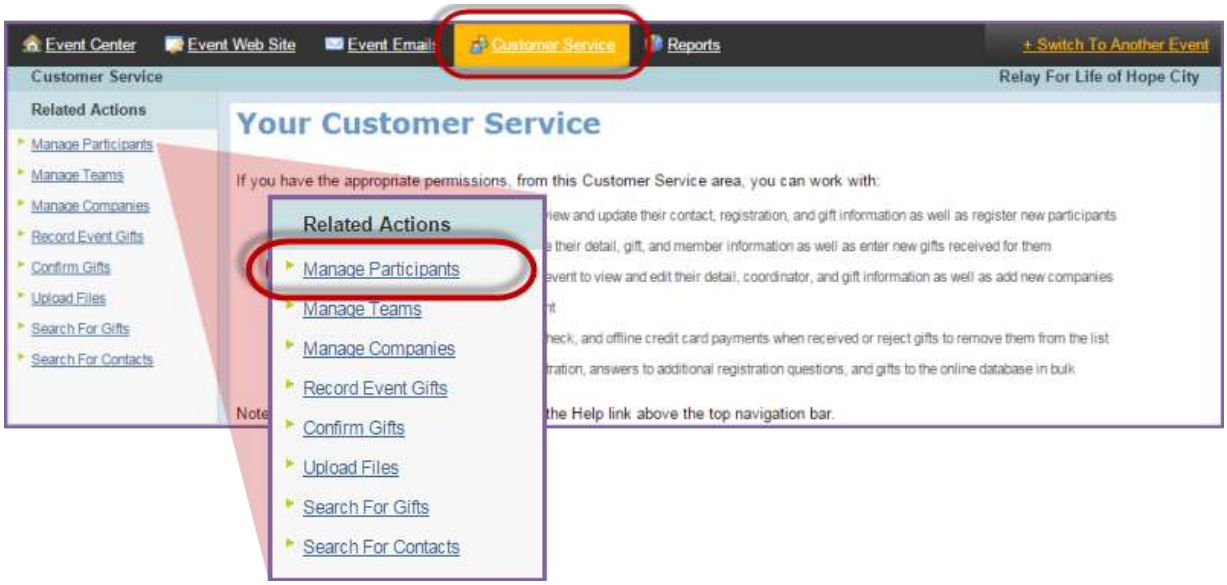


View a Participant's Gift History

Help track and review a participant's donation history and success from the Event Management Center in order to address questions or concerns from the Relayer or donor. From the Event Manager Center, you can view and manage a participant's fundraising efforts.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

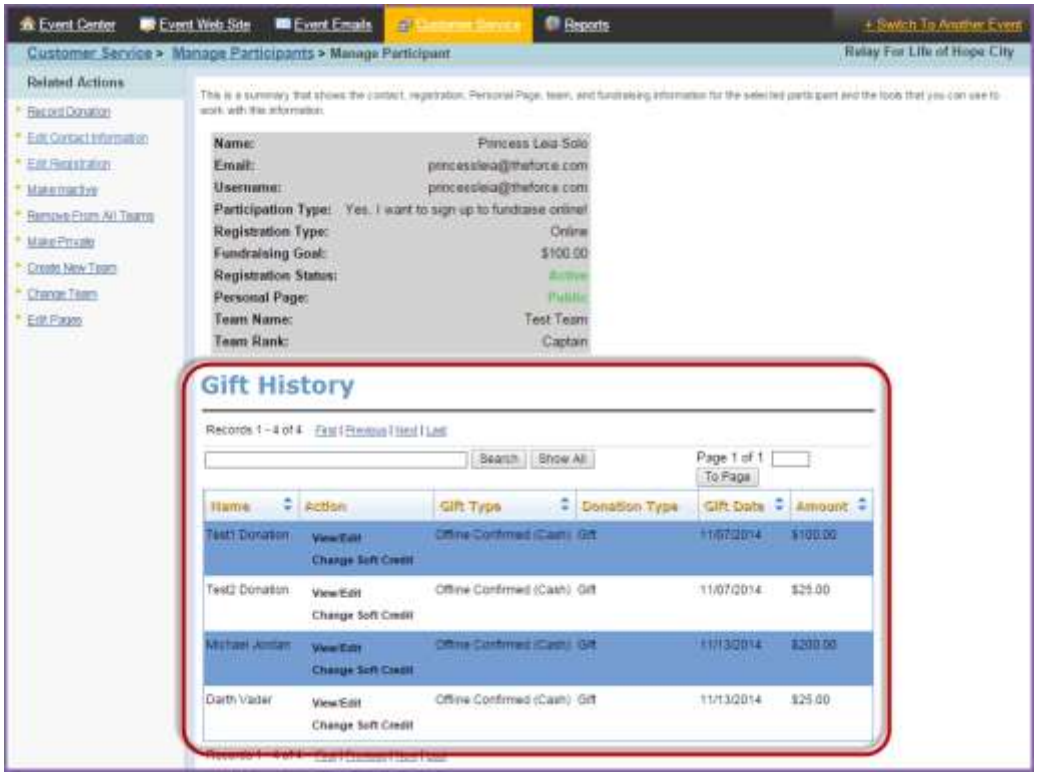
2. Under Related Actions, select **Manage Participants**.



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

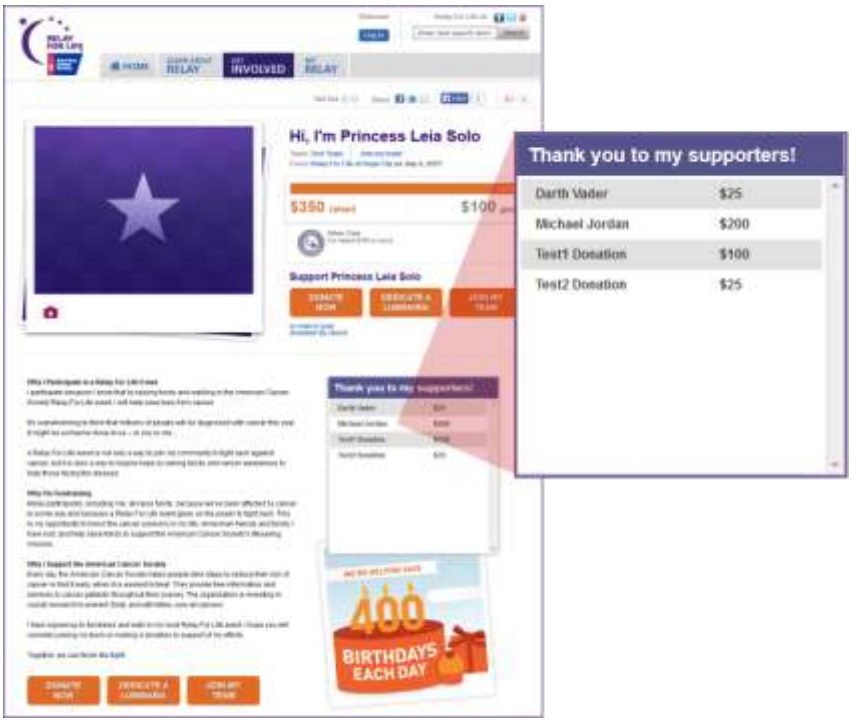
4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

5. On the participant's account record, scroll to the bottom of the page. View the **Gift History** section.



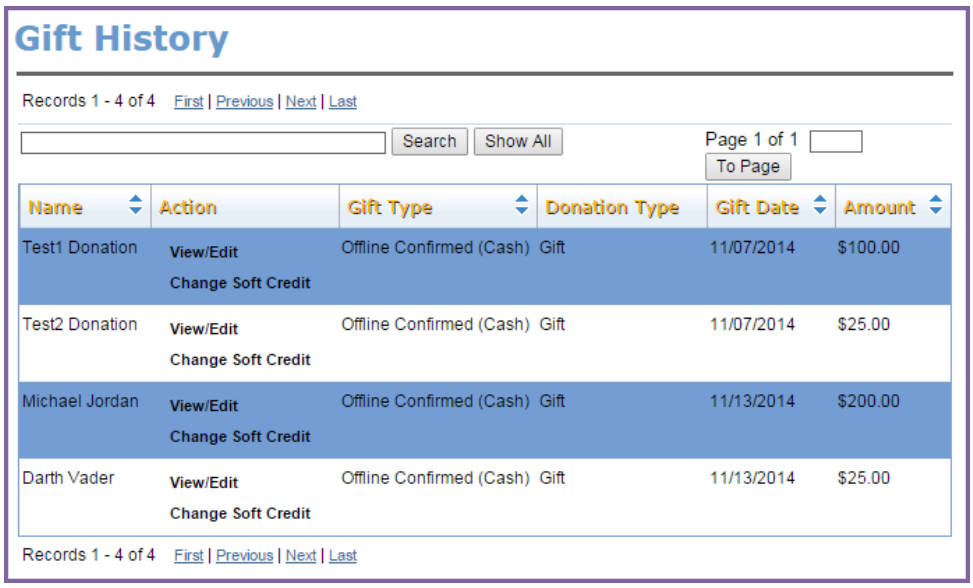
Change the Honor Roll Name on a Participant's Page

The Honor Roll recognizes donors and their contributions on the Relay For Life participant's personal pages.

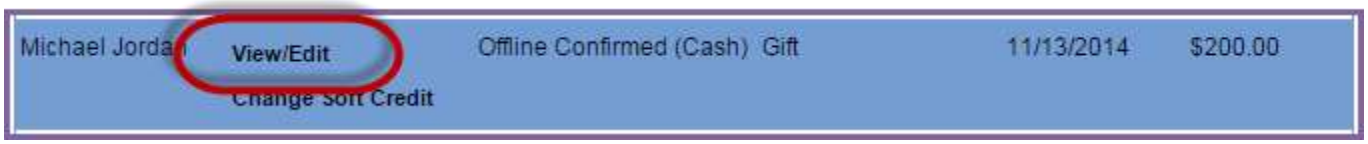


Some donors may choose to be referred to by a different name or to remain anonymous. As the Online Chair, you may update how the donor and donation is displayed on each participant page.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions (left hand side of the page), click **Manage Participants**.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
4. Beside the participant's account, click **Manage Participant** to access the participant's profile.
5. On the participant's account record, scroll to the bottom of the page. View the **Gift History** section.



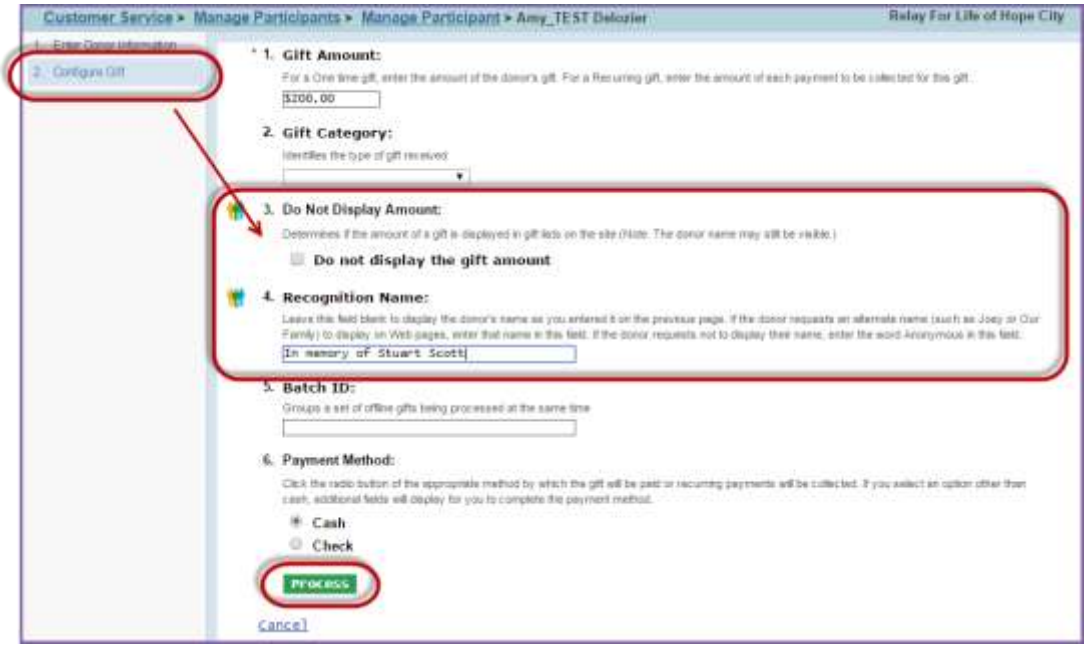
6. Find the donation whose appearance in the Honor Roll you wish to update. Beside the gift record, click the **View/Edit** link.



7. Skip to step **2. Configure Gift**

8. Specify and update the necessary information:
    a. **Do Not Display Amount**: Check the box beside "**Do not display the gift amount**" if the donor does not wish to have his/her donation amount displayed publically on the personal page.
    b. **Recognition Name**: If this field is left blank, the Recognition Name is defaulted to the donor's Name, but you can update the donor's name as s/he wishes it to appear on the Honor Roll. If the donor wishes to remain anonymous, enter "Anonymous" in the field provided.

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



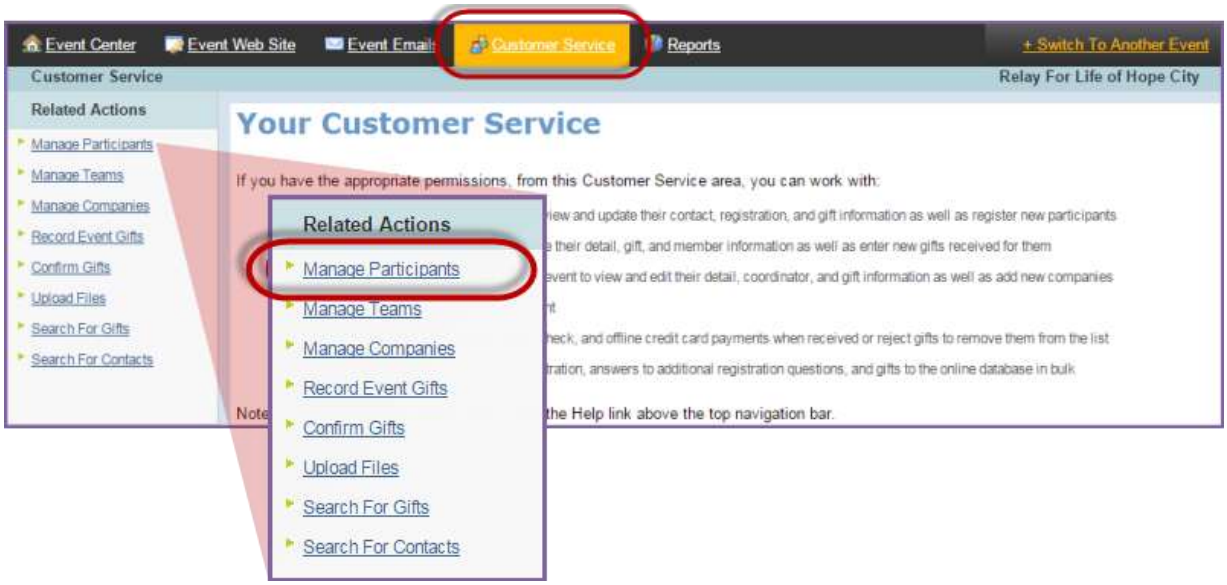
Move the Credit of a Donation to Another Participant

While all donations made on your Relay For Life website support the mission of the American Cancer Society, gifts may be credited to the event, team, or participant level. As the Online Chair, you may move the credit of a donation to the proper person or team based on the donor's intent.

***Note**: If you don't know who the donation is credited to initially, you may search for the gift through the Manage Teams or Search For Gifts area (search by donor name). You may also run a donation report to find the donors name and where the gift was initially given.*

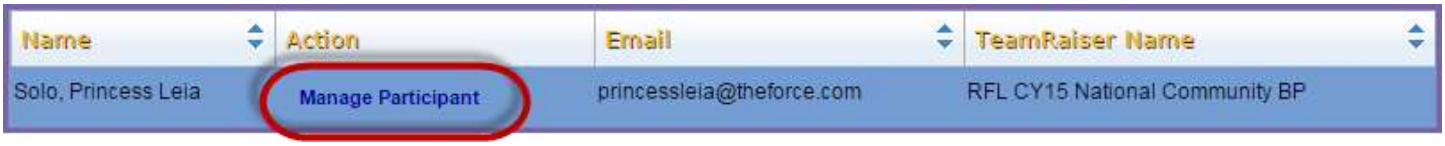
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.

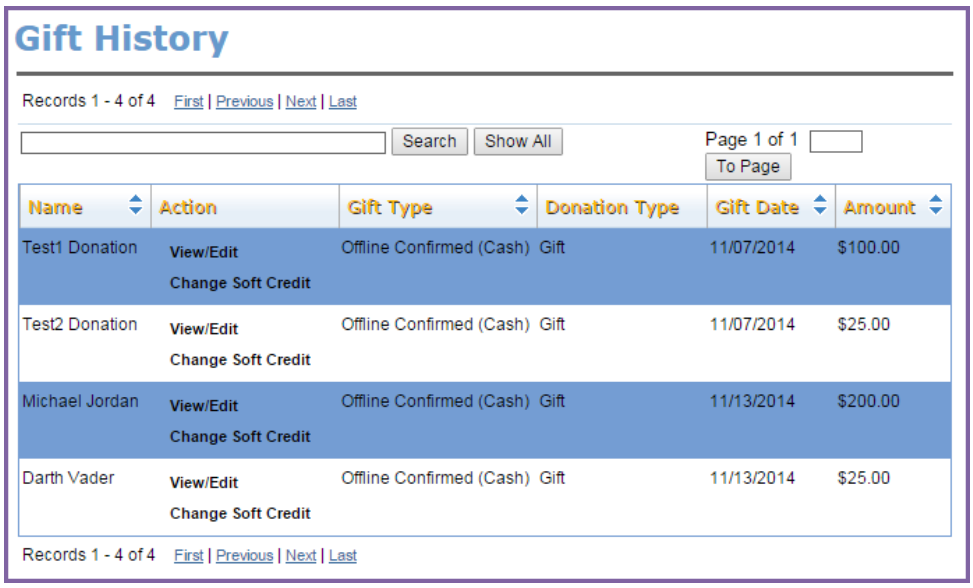


3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

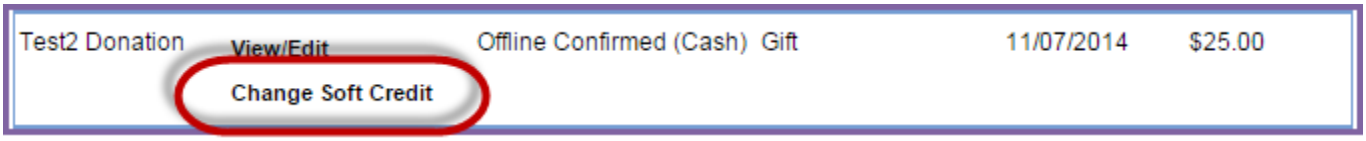
4. Beside the participant's account, click **Manage Participant** to access the participant's profile.



5. On the participant's account record, scroll to the bottom of the page. View the **Gift History** section.

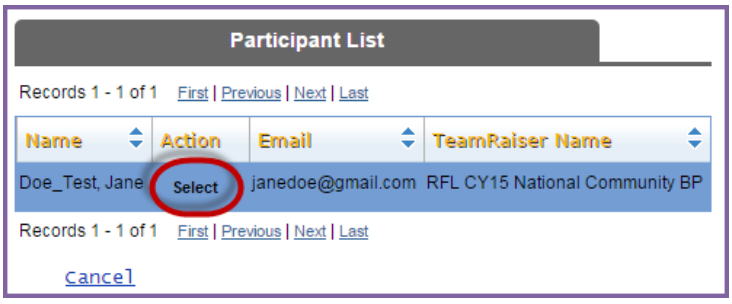


6. Beside the gift you wish to move, click the **Change Soft Credit** link.



7. Identify who will receive credit for the donation. You can adjust the gift credit to another participant, team, or the general Relay For Life event. Click the appropriate **radio button** before clicking **Search for Recipient**.

8. Identify the recipient of the donation through the list provided or through a search. Click **Select** next to the person or team to whom you are reassigning credit for the donation.



9. **Confirm Changes**: Review the transaction information and the change in soft credit before confirming. If it is correct, click **Finish** and the credit of a donation will be moved.

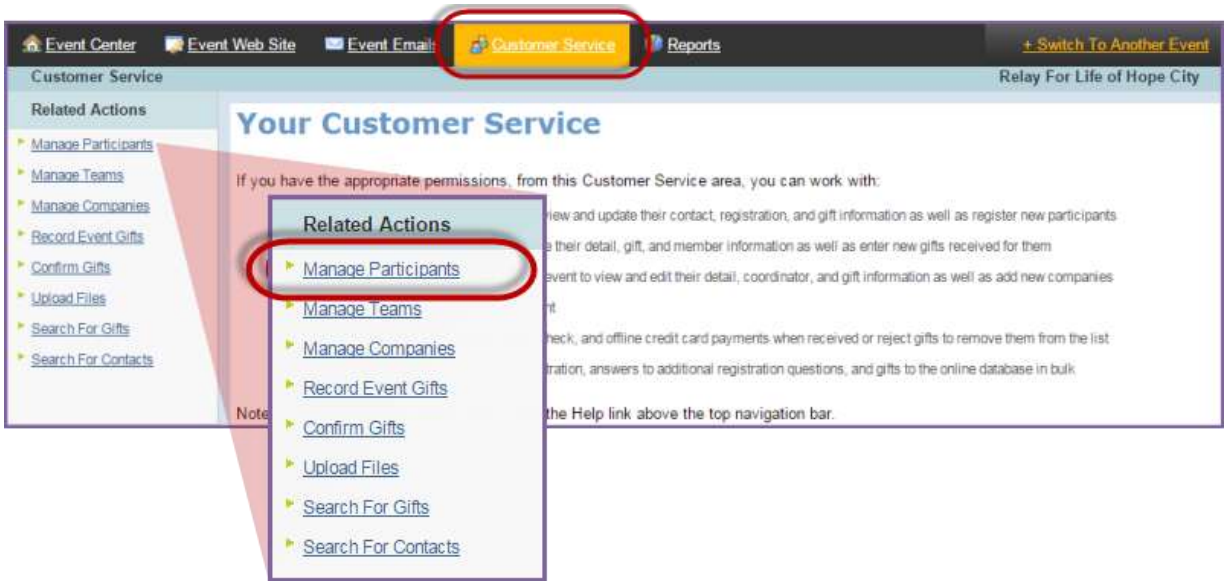
Note: *Changing the soft credit of a donation will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Refund a Donation

As the Online Chair, you may be requested to refund part, or all, of an online credit card gift.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.

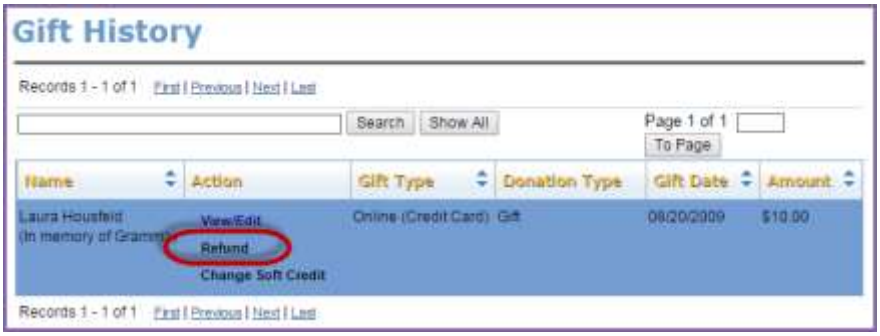


3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

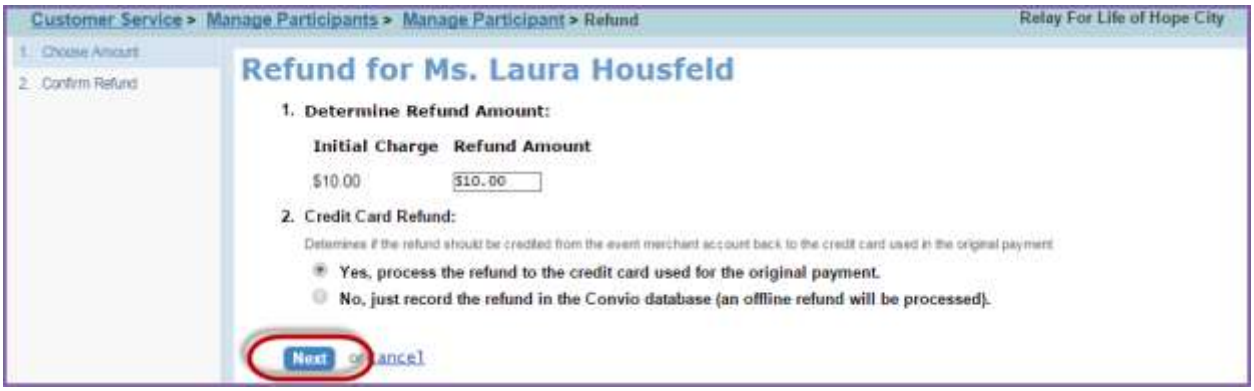
5. On the participant's account record, scroll to the bottom of the page. View the **Gift History** section.

6. Beside the gift you wish to refund, click the **Refund** link.

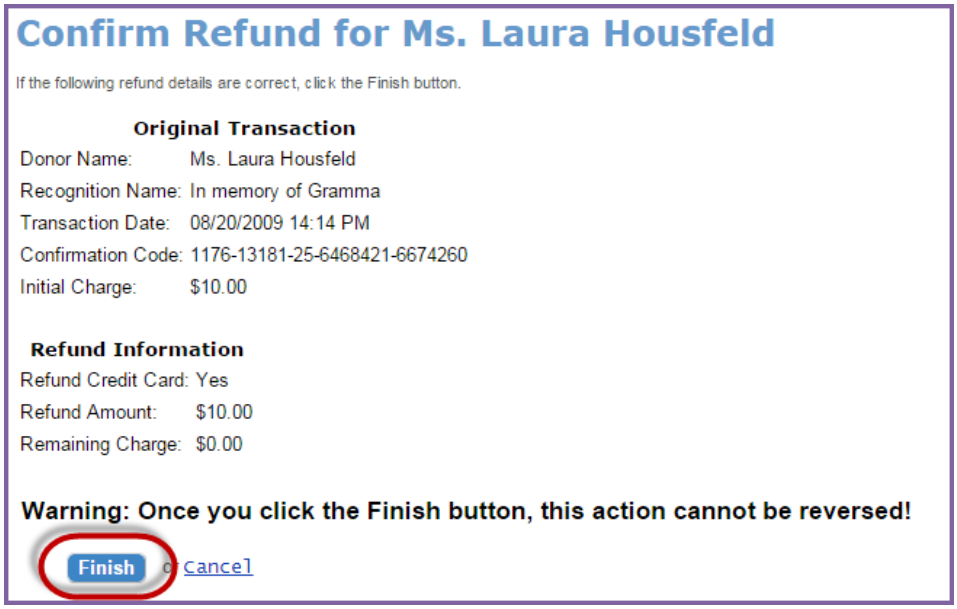


Enter the amount that you wish to refund to the donor.

a. Leave refund amount field 'as is' if you wish to process a full refund.
b. You can enter a smaller amount if the donor only wish to have a partial refund (ex. They entered $100, when they meant to only enter $10. You will refund $90)
c. Confirm that the gift is to be **returned to the initial credit card** before clicking **Next**.



7. Click **Finish** to confirm the refund.



Edit the Registration Information of a Participant

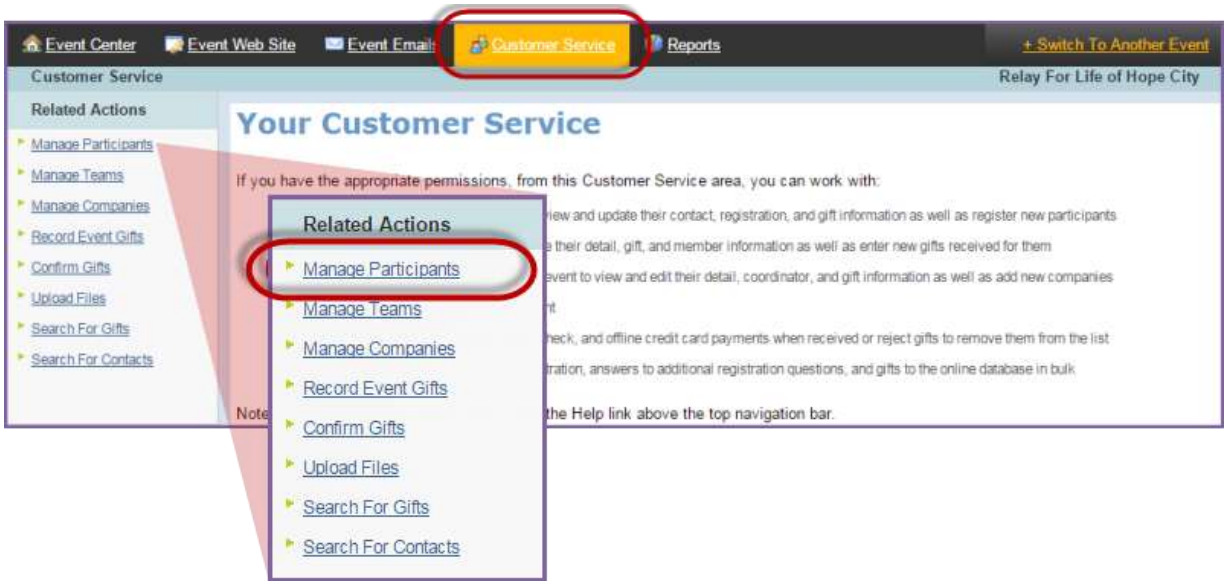
Update a Participant's Basic Registration Information

The Online Chair may update some of the participant's basic information as entered during the registration process, including the individual's participation type, additional registration responses, and registration fee payment.

Note: *Participant's name and contact information cannot be updated in the Event Management Center.* Please instruct the participant to make those necessary changes through the Relay Dashboard. See Chapter 3 in the Participant Experience Guide: Manage Your Online Information for more details.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

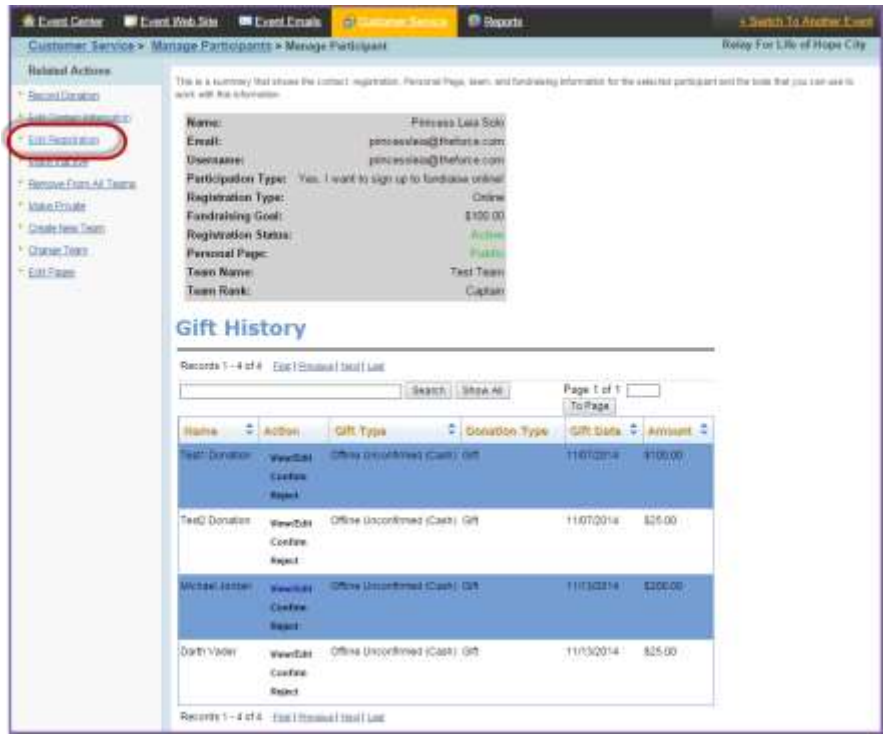
2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

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



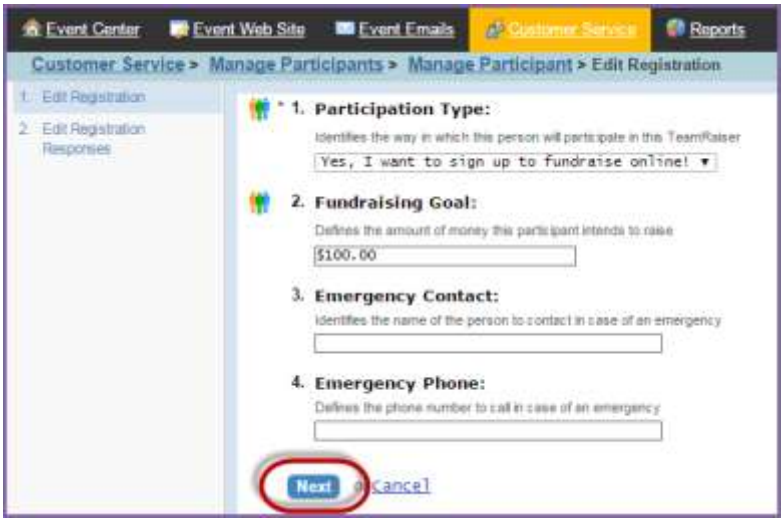
a. Make changes to the individual's online registration as needed:

i. Update the individual's **participation type** from the drop down.

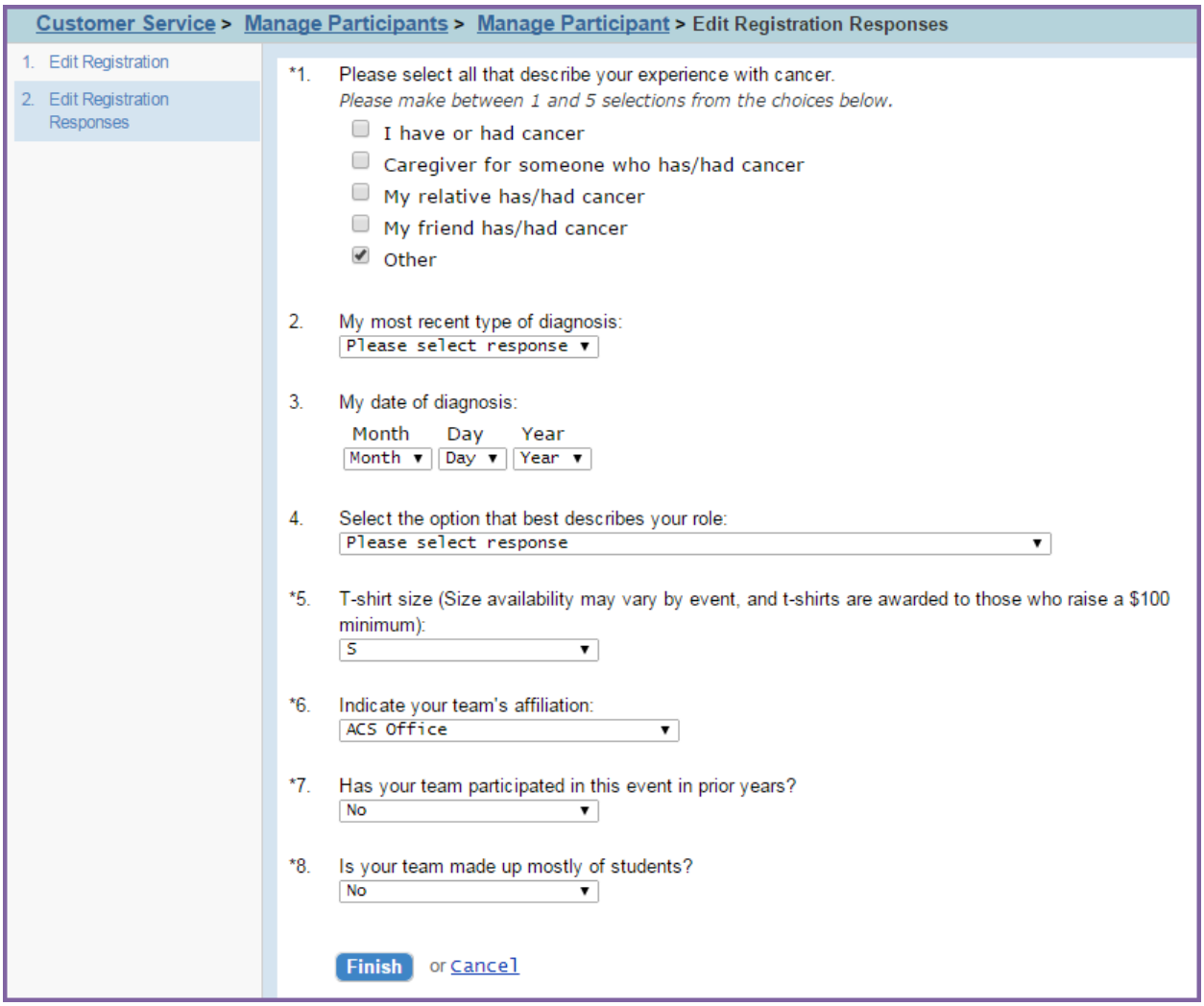
ii. Change the participant's individual **fundraising goal**. *Shhh: Don't tell Relayers you can do this! Have them update their own goal in their Relay Dashboard.*

iii. Add **emergency contact** information

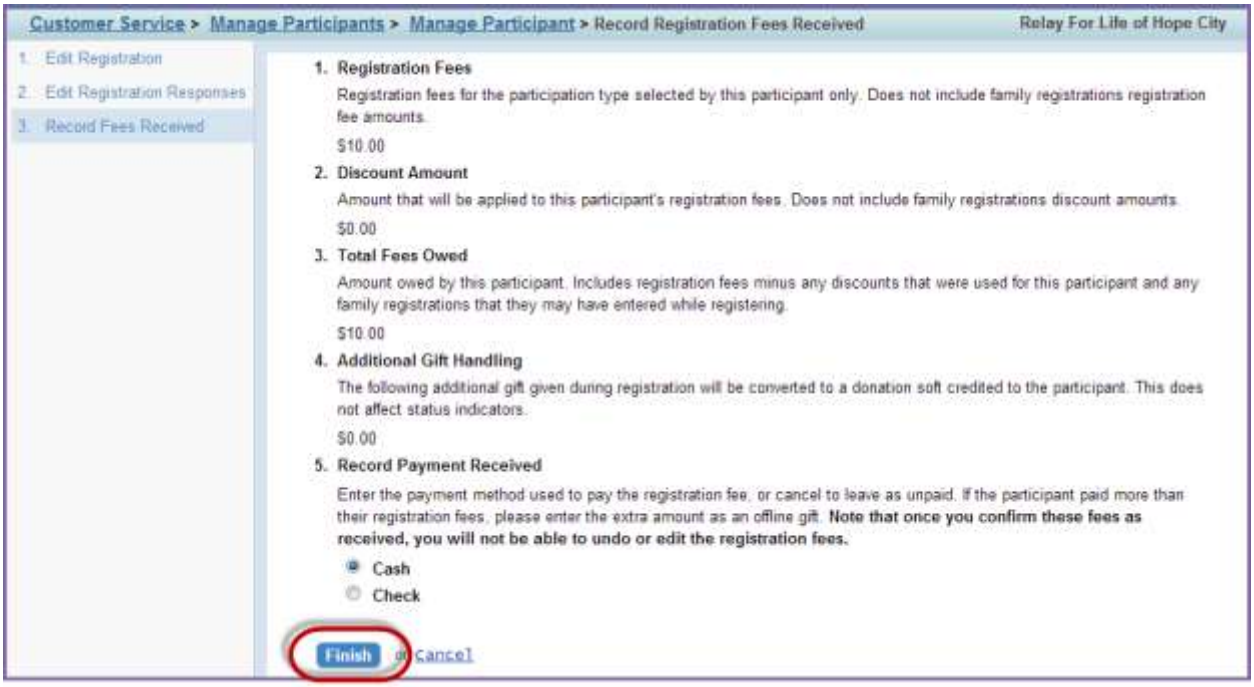
iv. Click **Next**.



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



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



Delete a Participant's Online Registration

If an individual accidentally registers twice, or registered for the wrong event, the Online Chair may delete their online registration.

When you deactivate a participant:

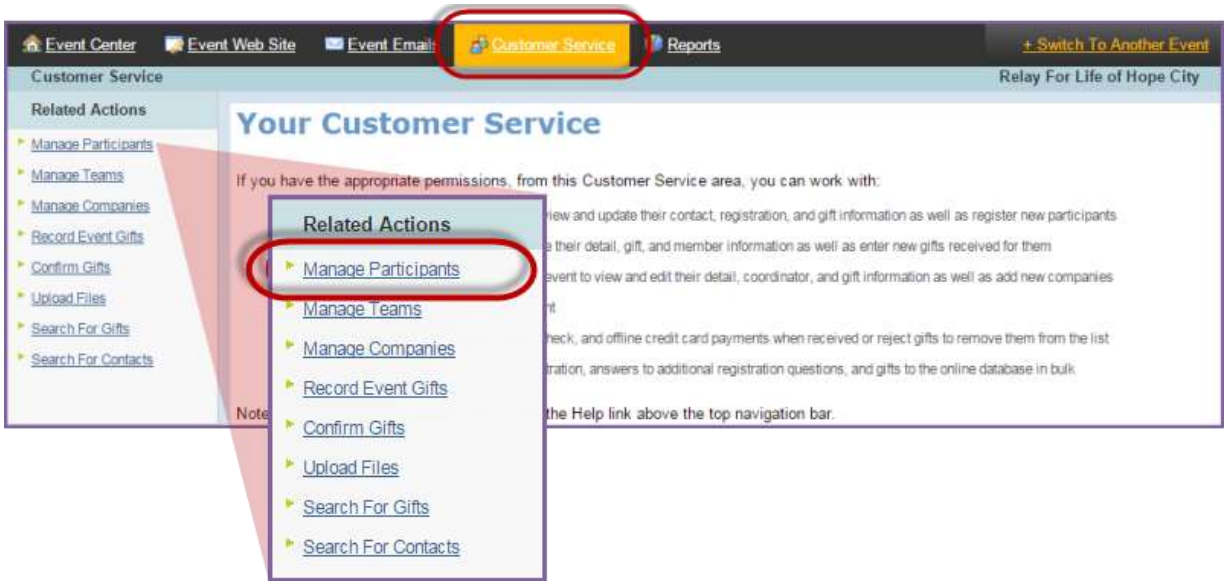
- The participant will be removed from the group of participants for this event.
- The participant will be removed from the list of pending autoresponders for this event.
- The participant will not be displayed in search results when donors, people who want to join their team and other site visitors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

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

- Assign a new team member to the captain position
- Remove the initial team captain from all teams
- More information about these steps can be found later in this chapter.

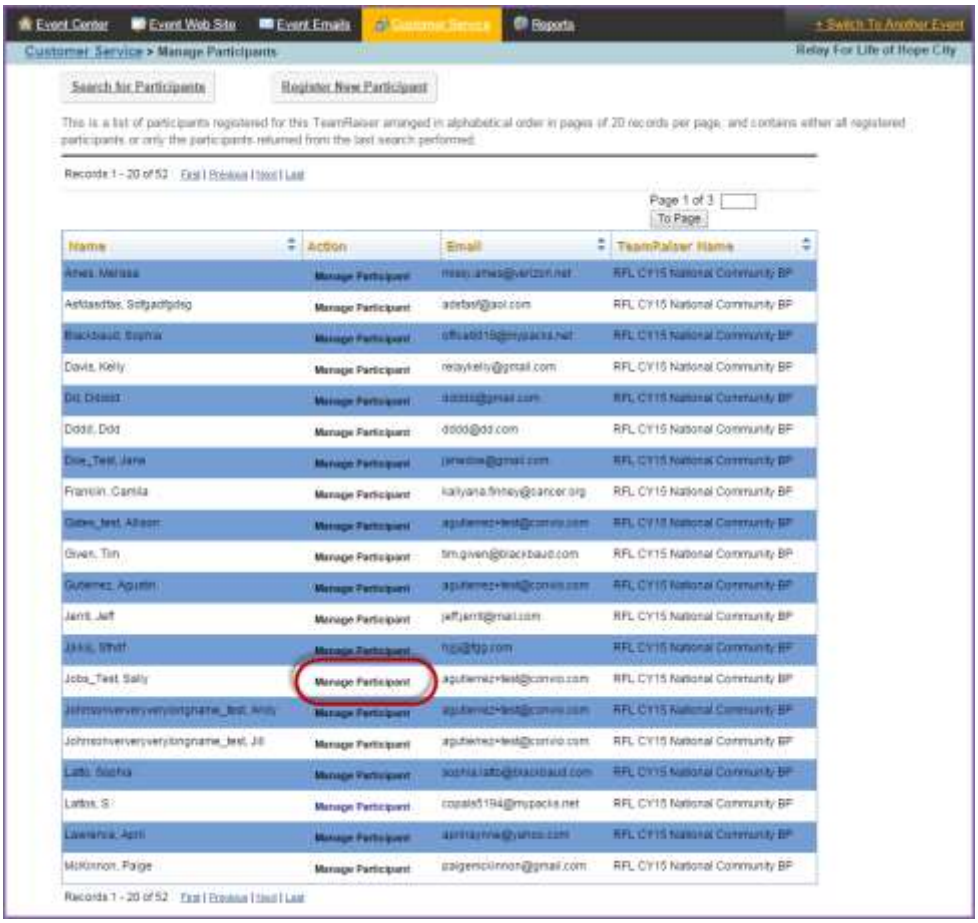
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.



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

6. Click **Make Inactive** to deactivate the participant's registration.

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

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

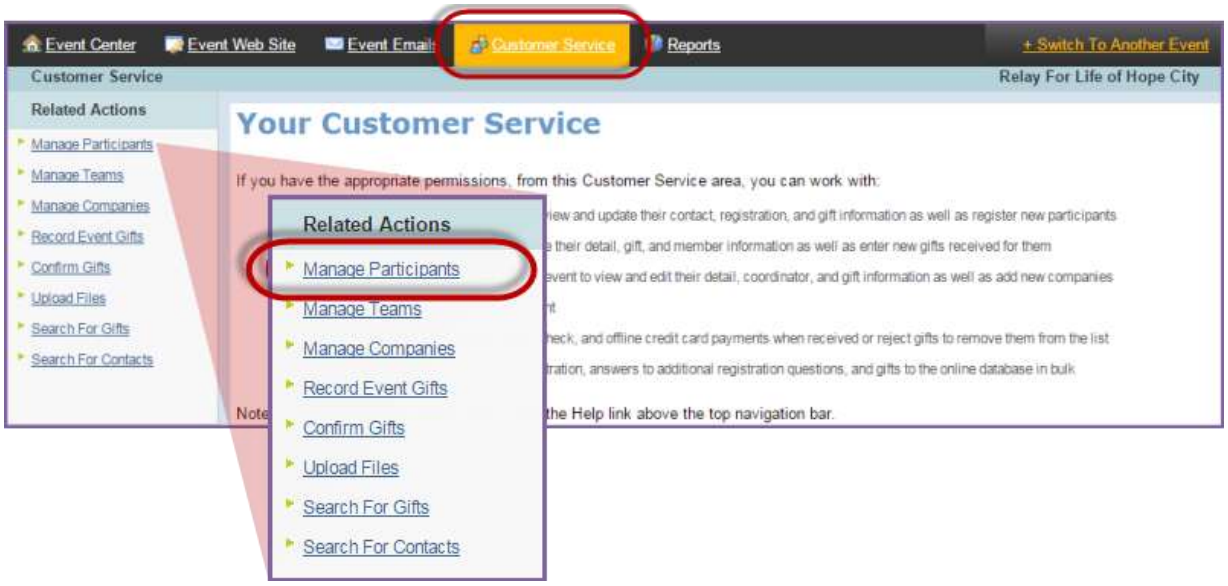
Make a Participant's Registration Private

Local celebrities or politicians, or underage children, may wish to hide their Relay pages from the public view by marking the page as private. This action can also be done by the participant through the Relay Dashboard.

It is not recommended to make a participant's registration private as it prevents donations from being made. In addition, site users will not be able to search for this participant.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.

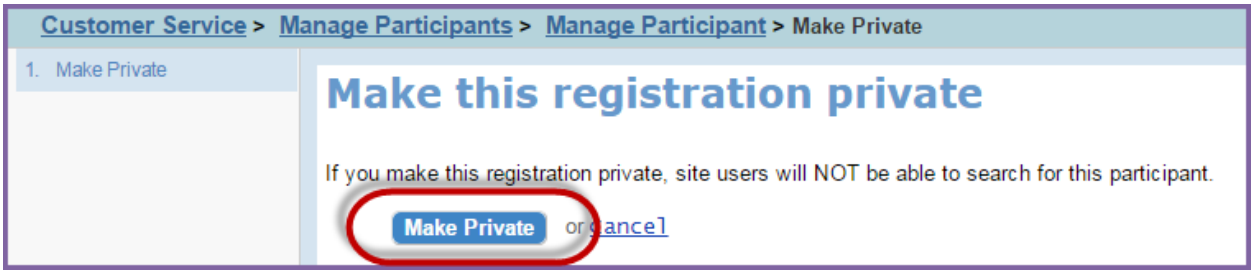


3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

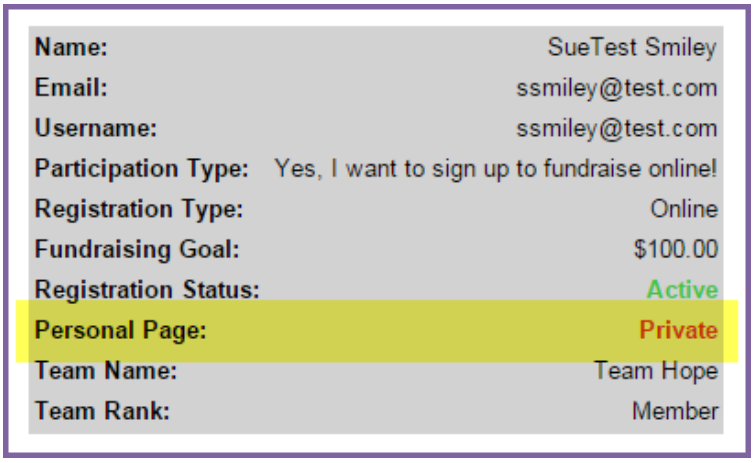
4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

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

6. Confirm the change to the public page by clicking **Make Private**.



7. Once a participant is private, the record will reflect this update.



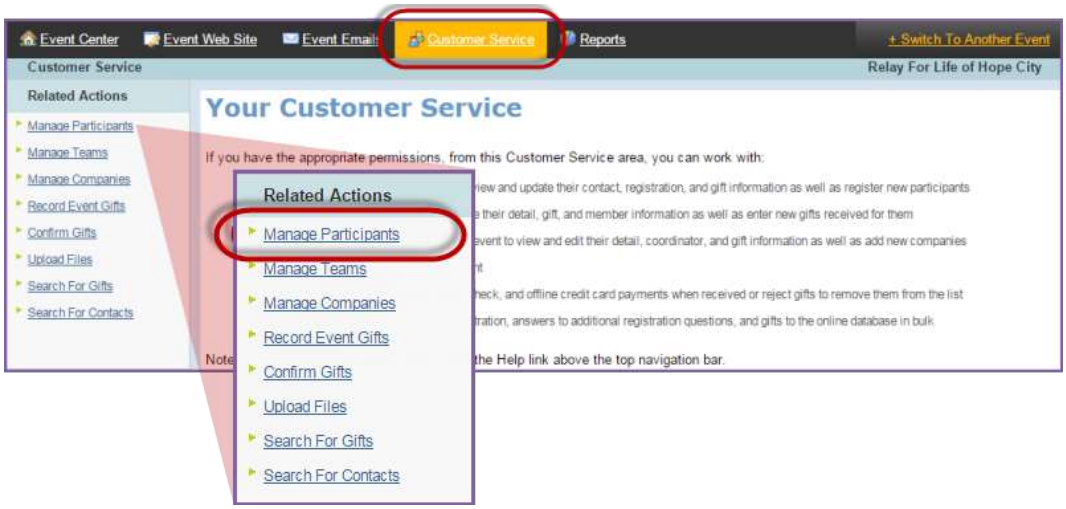
Edit the Team Information of a Participant

Move a Participant to a Team

If a participant accidentally registered as an individual, or signed up on the incorrect team, you can easily assign them to the correct team through the Event Management Center.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

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

6. Select the new team from the list, or use the **Search** feature to locate it easily.

7. Click **Select** next to the correct team name. Then confirm by clicking **Finish**.

Note: *Changing the team membership of an individual will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Create a New Team with a Participant as Team Captain

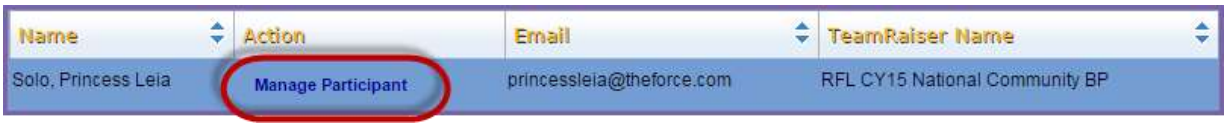
Does a team need to split into two? Does someone from a team want to start their own team? You can create a new team by moving a team member to become a new team captain.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

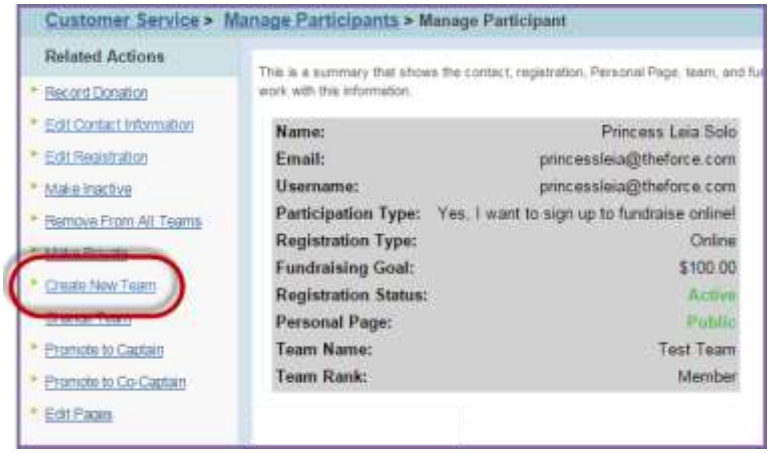
2. Under **Related Actions**, select **Manage Participants**.

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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.



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



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

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

Note: *Changing the team membership of an individual will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

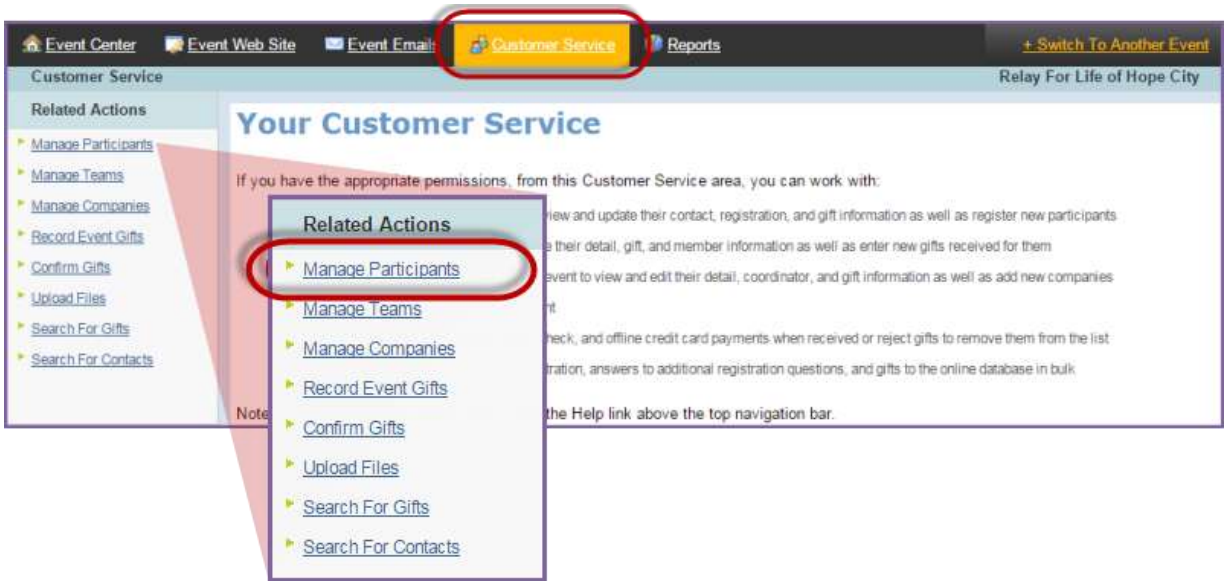
Promote or Demote Team Members and Team Captains

As an Online Chair, you may help re-structure the leadership of a team by promoting and demoting members into the role of Team Captain. ***Note:*** *each team must have at least one member listed as the Team Captain.*

This action can be done by the participant through the Relay Dashboard.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

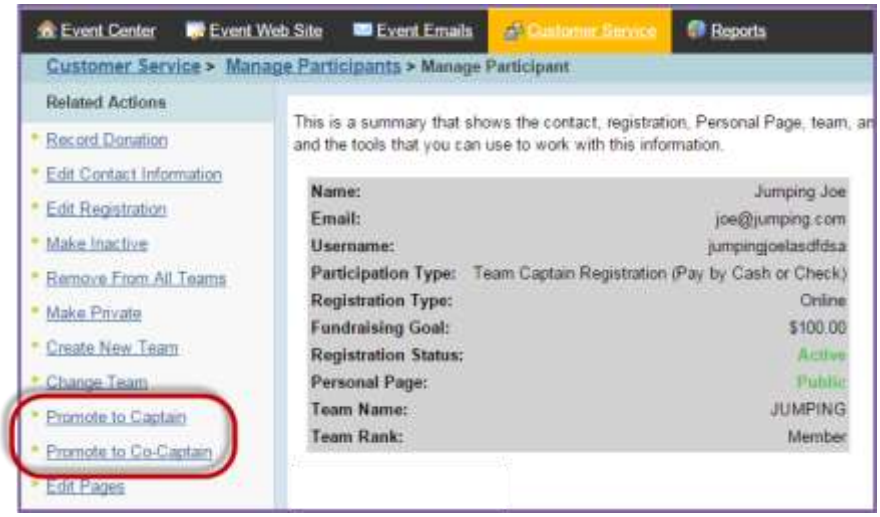
2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
    a. Click **Finish** to save the change of leadership.



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

Chapter 7: Customer Service – Manage Teams

- Search for a Team
- View Team Member Roster
- View Team's Gift History
    - Move the Credit of a Team Donation
- Edit a Team's Registration Information
- Edit the Team Information of a Participant
    - Move a Participant to a Team
    - Create a New Team with a Participant as Team Captain
    - Promote or Demote Team Members and Team Captains

As your community's Relay For Life Online Chair, you are able to provide a great deal of customer service support to registered teams. Through the Event Manager Center, you may find the tools available to you to address questions and provide teams with a smooth experience to fundraise and build support.

Search for a Team

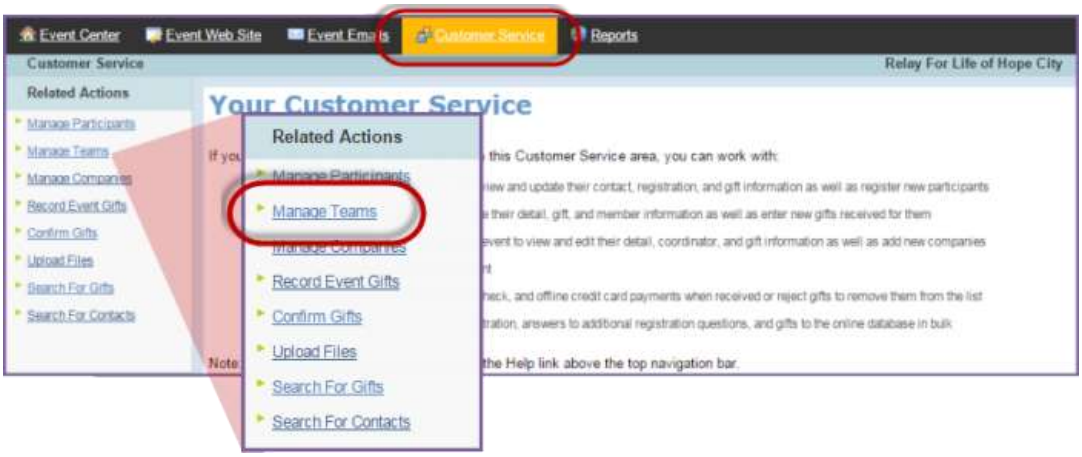
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

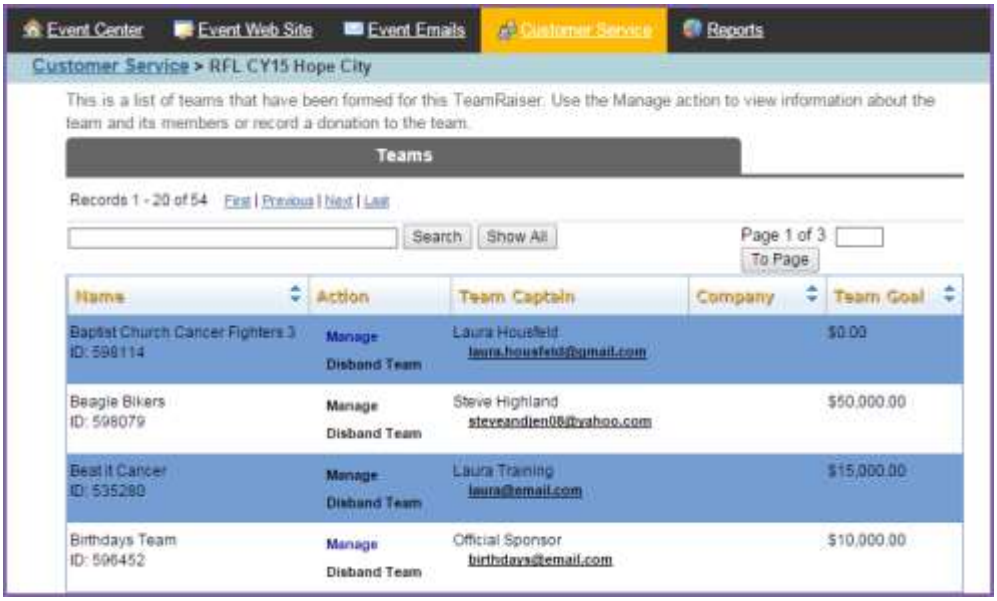
4. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

5. Under Related Actions, select **Manage Teams**.



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

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

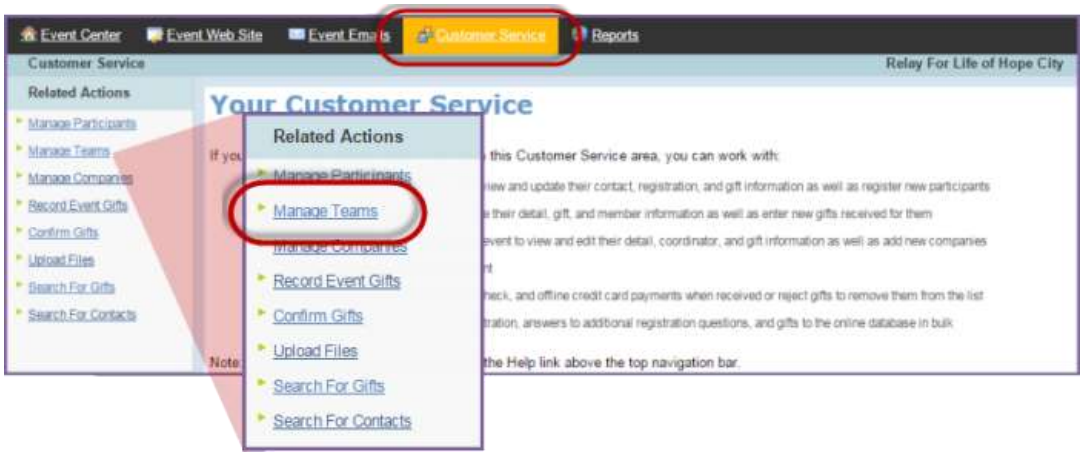


7. Beside the team's account, click **Manage** to access the Team profile.

View Team Member Roster

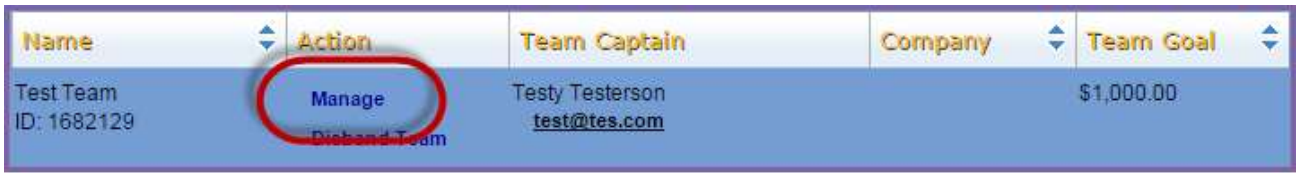
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Teams**.

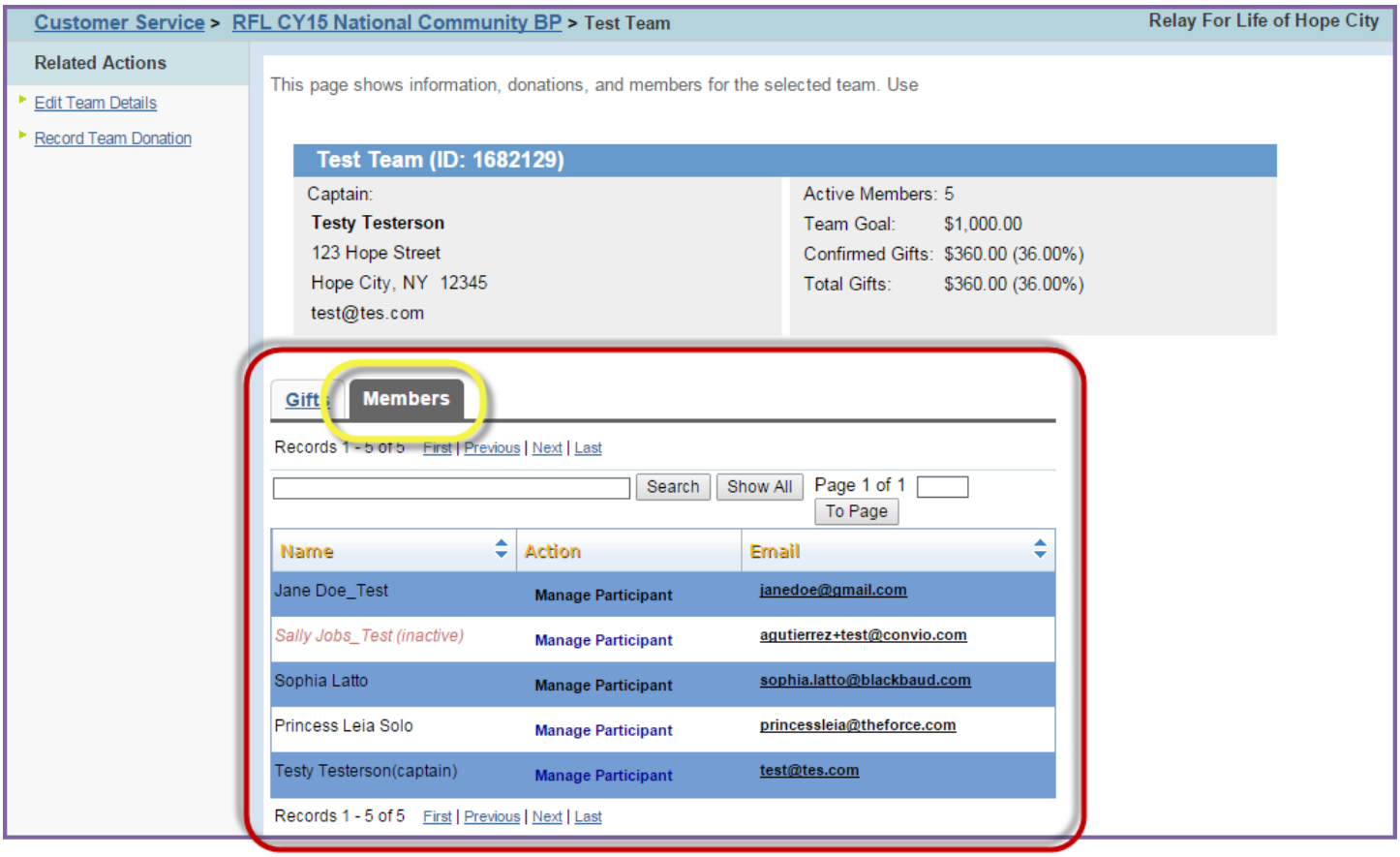


3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Beside the team's account, click **Manage** to access the Team profile.



5. On the team's account record, scroll to the bottom of the page and click the **Members** tab to full a complete list of team members.

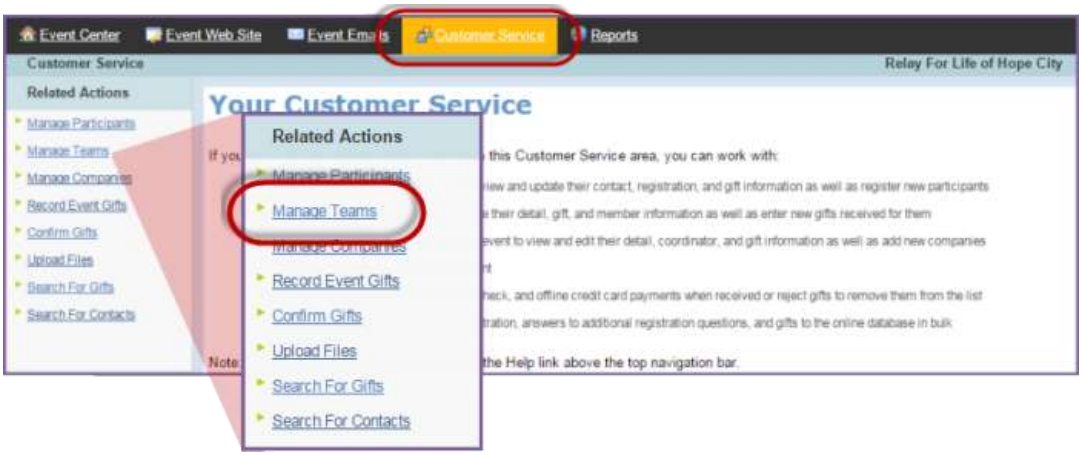


View a Team's Gift History

Help track and review a team's donation history and success from the Event Management Center in order to address questions or concerns from the Relayer or donor. From the Event Manager Center, you can view and manage a team's fundraising efforts.

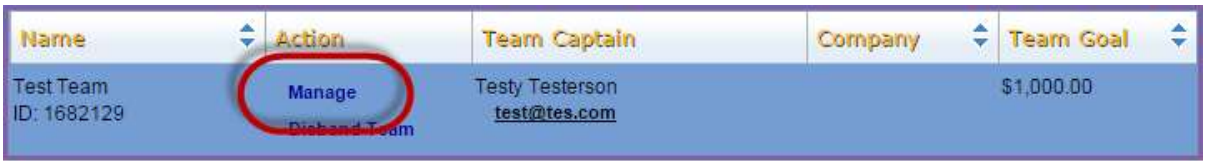
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Teams**.

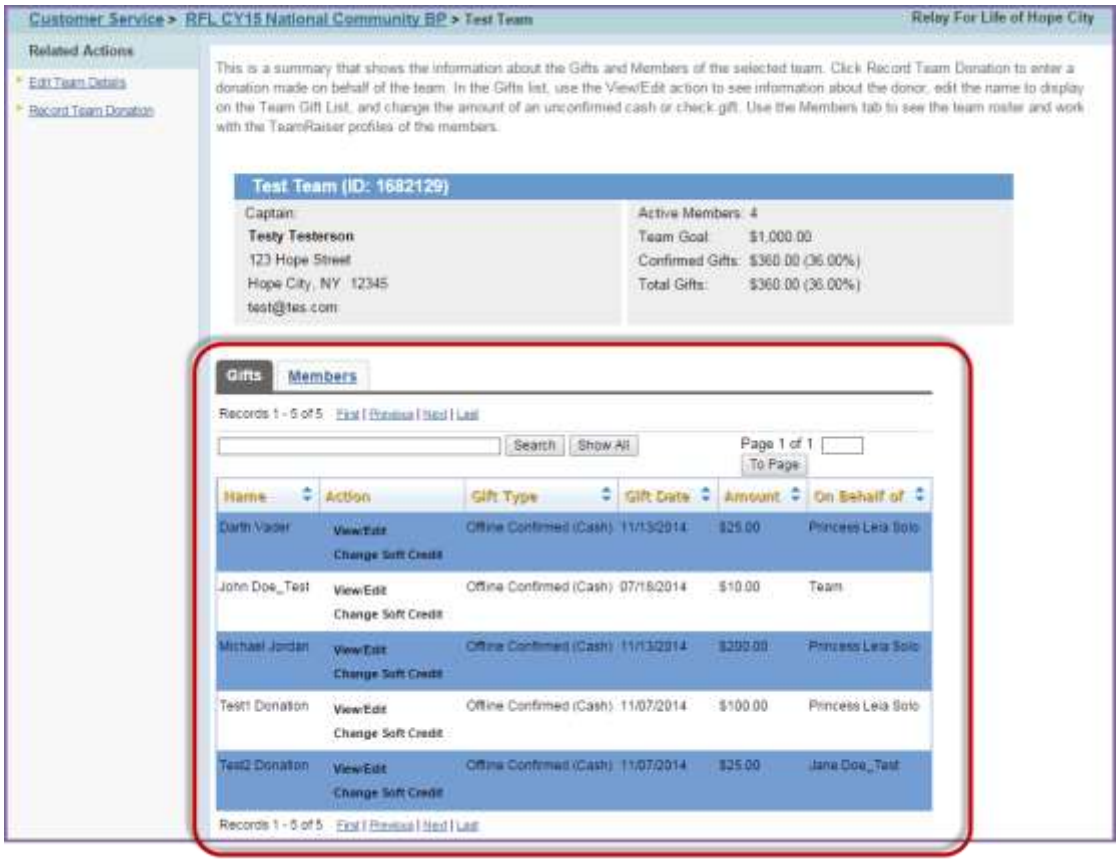


3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Beside the team's account, click **Manage** to access the Team profile.



5. On the team's account record, scroll to the bottom of the page. View the **Gift History** section.



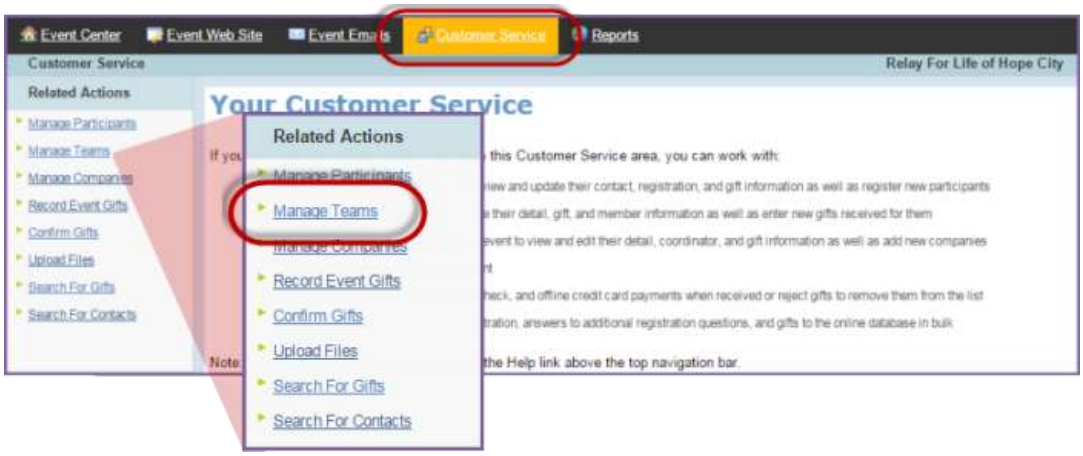
Move the Credit of a Team Donation

While all donations made on your Relay For Life website support the mission of the American Cancer Society, gifts may be credited to the event, team, or participant level. As the Online Chair, you may move the credit of a donation to the proper person or team based on the donor's intent.

***Note**: If you don't know who the donation is credited to initially, you may search for the gift through the Manage Teams or Search For Gifts area (search by donor name). You may also run a donation report to find the donors name and where the gift was initially given.*

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

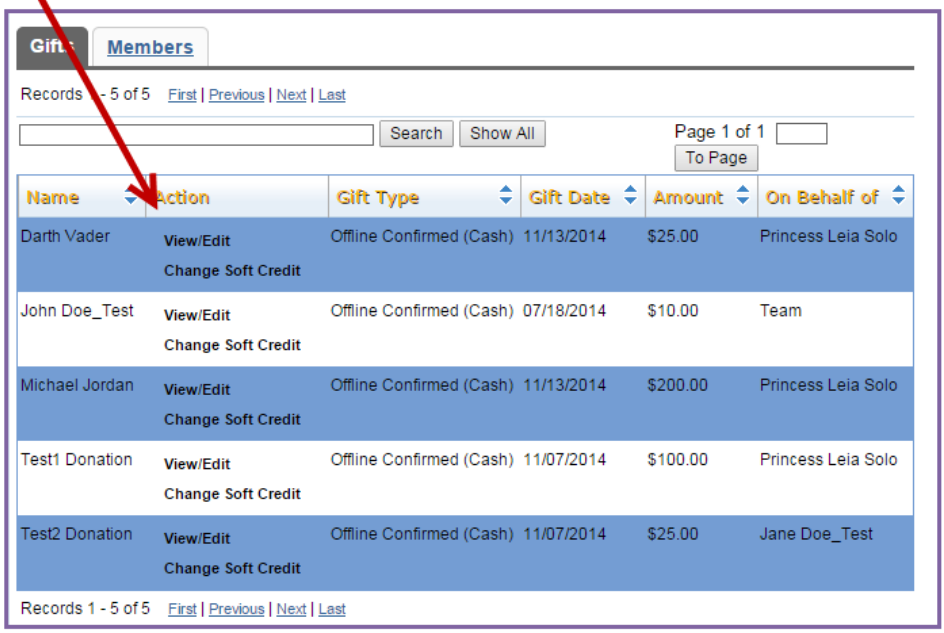
2. Under Related Actions, select **Manage Teams**.



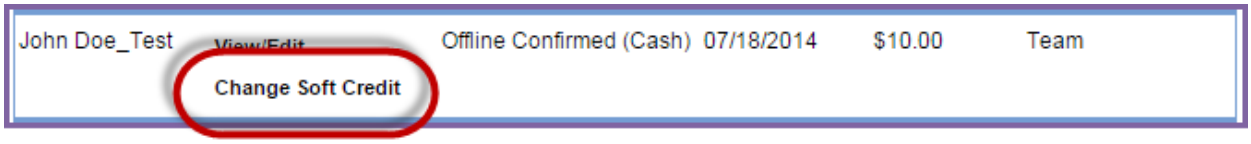
3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Beside the team's account, click **Manage** to access the Team profile.

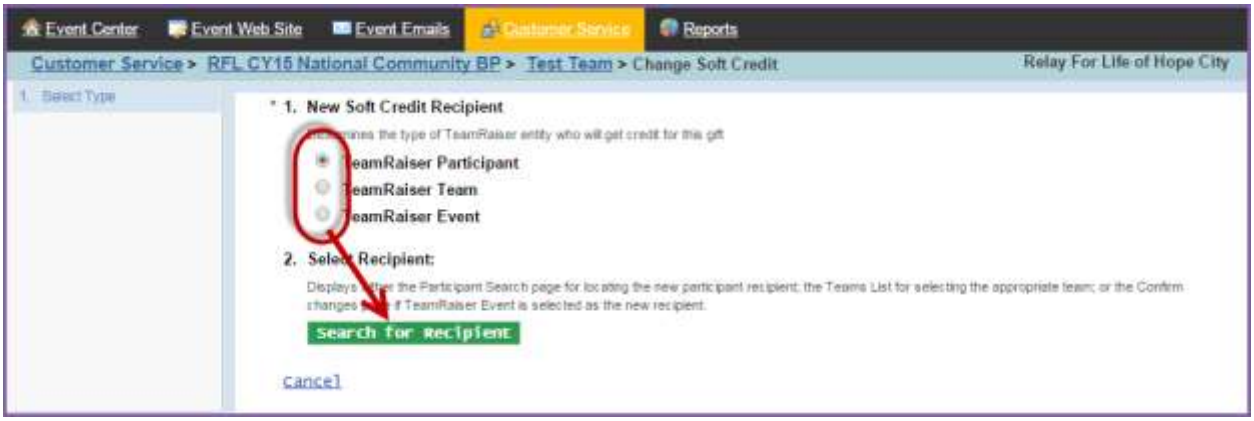
5. On the team's account record, scroll to the bottom of the page. View the **Gift History** section.



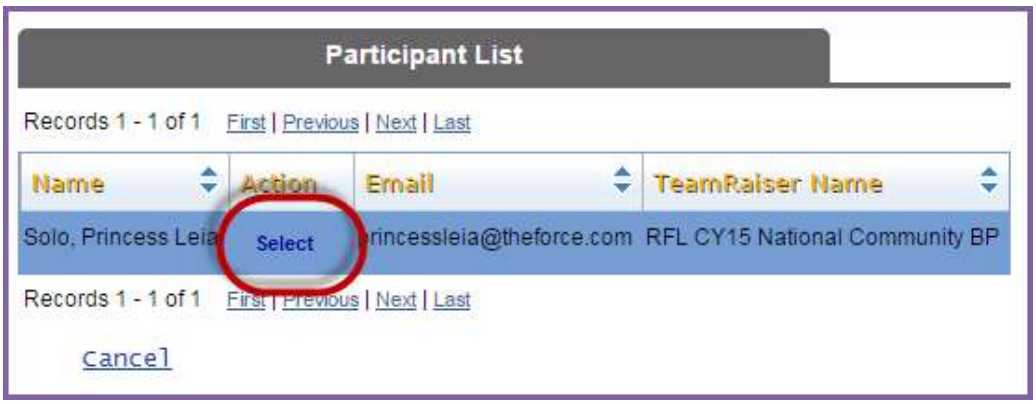
6. Beside the gift you wish to move, click the **Change Soft Credit** link.



7. Identify who will receive credit for the donation. You can adjust the gift credit to a participant, another team, or the general Relay For Life event. Click the appropriate **radio button** before clicking **Search for Recipient**.



8. Identify the recipient of the donation through the list provided or through a search. Click **Select** next to the person or team to whom you are reassigning credit for the donation.



9. **Confirm Changes**: Review the transaction information and the change in soft credit before confirming. If it is correct, click **Finish** and the credit of a donation will be moved.

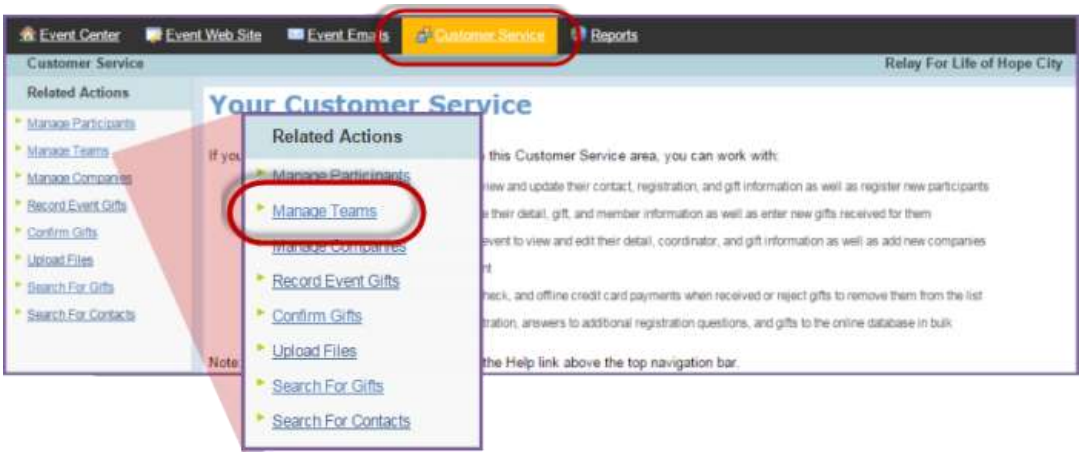
Note: *Changing the soft credit of a donation will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Edit a Team's Registration Information

The Online Chair may update some of the team's basic information as entered during the registration process, including the team name goal, and corporate affiliation. This information can also be updated by the Team Captain in the Relay Dashboard.

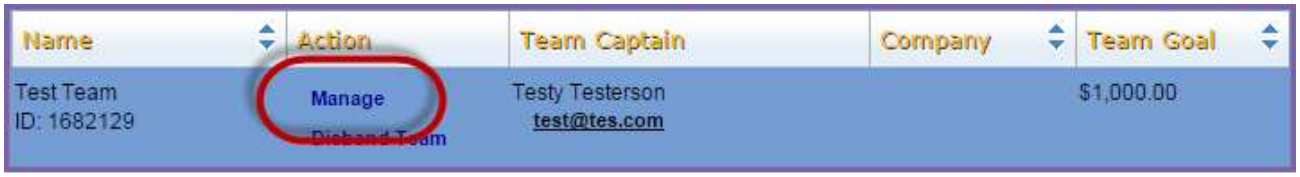
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Teams**.

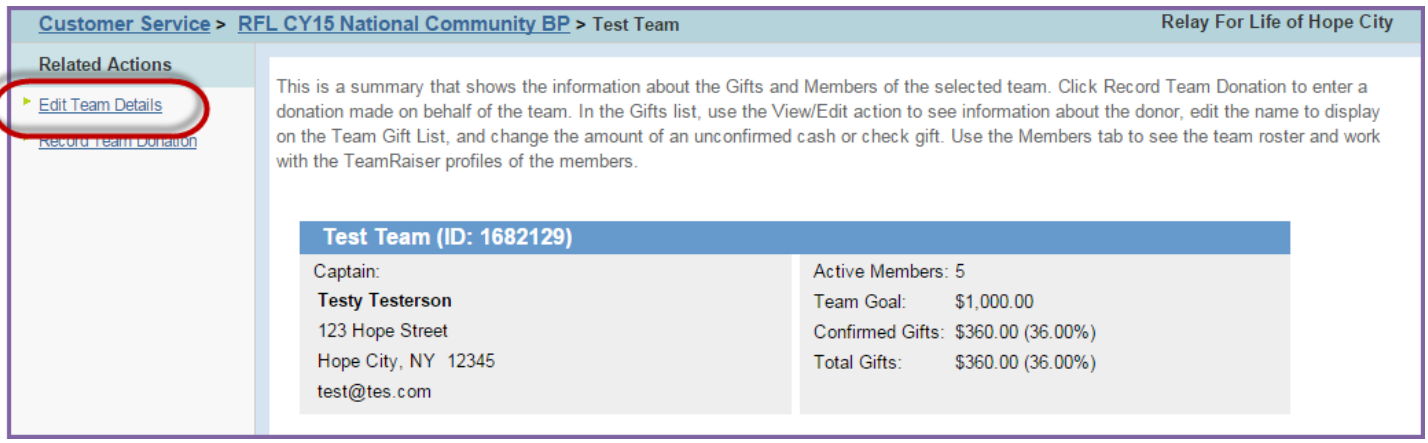


3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

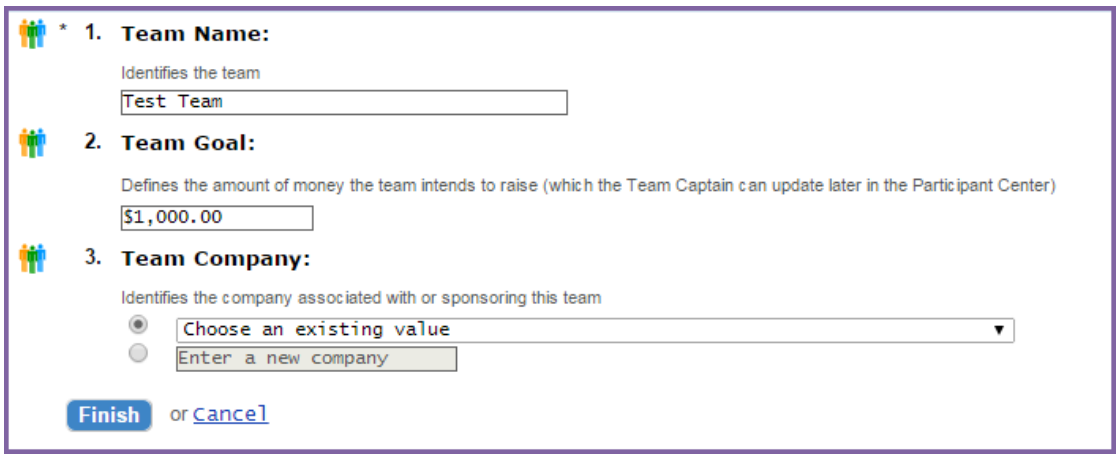
4. Beside the team's account, click **Manage** to access the Team profile.



5. From the team record, under Related Actions (left hand side of the page), click Edit **Team Details**.



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



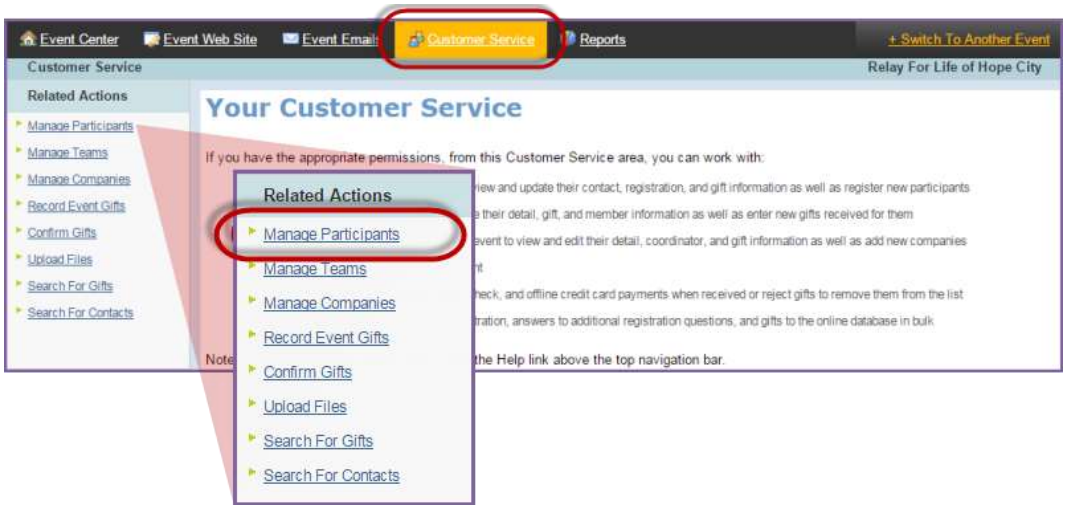
Note: *Changing the soft credit of a donation will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Edit the Team Information of a Participant

Move a Participant to a Team

If a participant accidentally registered as an individual, or signed up on the incorrect team, you can easily assign them to the correct team through the Event Management Center.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

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

6. Select the new team from the list, or use the **Search** feature to locate it easily.

7. Click **Select** next to the correct team name. Then confirm by clicking **Finish**.

Note: *Changing the team membership of an individual will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Create a New Team with a Participant as Team Captain

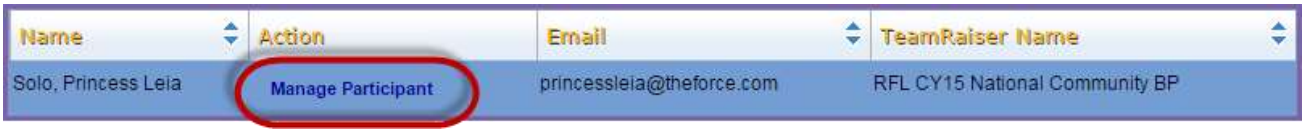
Does a team need to split into two? Does someone from a team want to start their own team? You can create a new team by moving a team member to become a new team captain.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

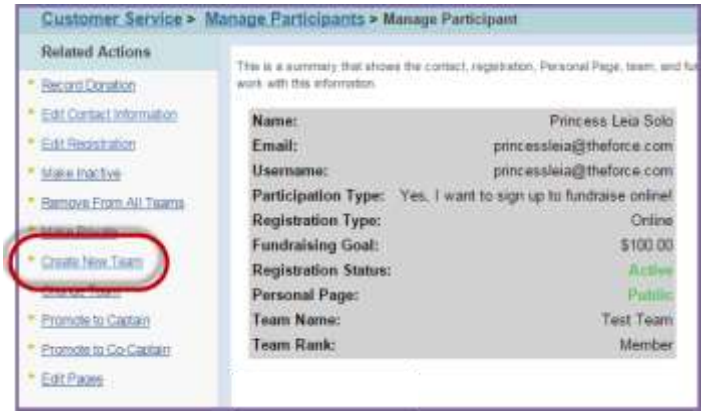
2. Under **Related Actions**, select **Manage Participants**.

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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.



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



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

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

Note: *Changing the team membership of an individual will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

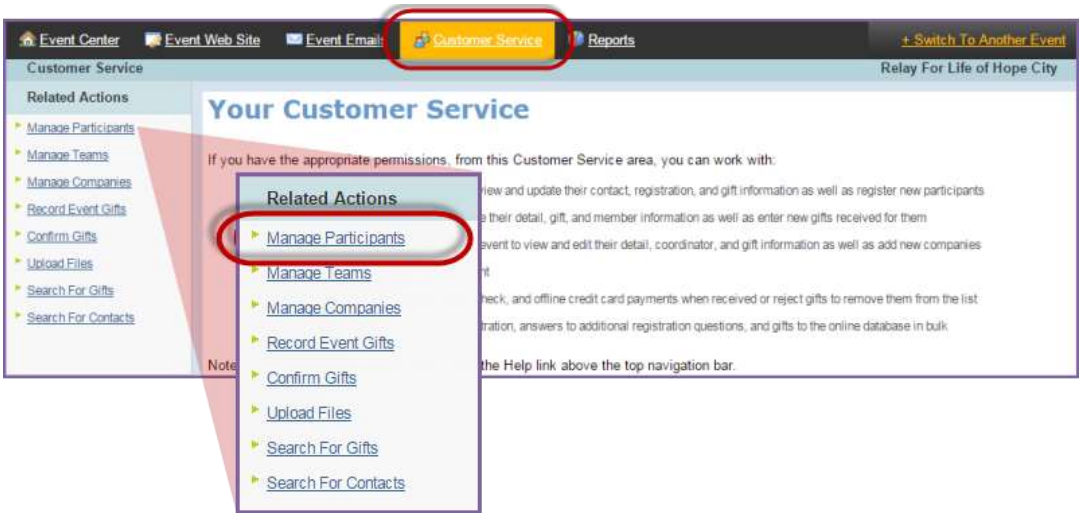
Promote or Demote Team Members and Team Captains

As an Online Chair, you may help re-structure the leadership of a team by promoting and demoting members into the role of Team Captain. ***Note**: each team must have at least one member listed as the Team Captain.*

This action can be done by the participant through the Relay Dashboard.

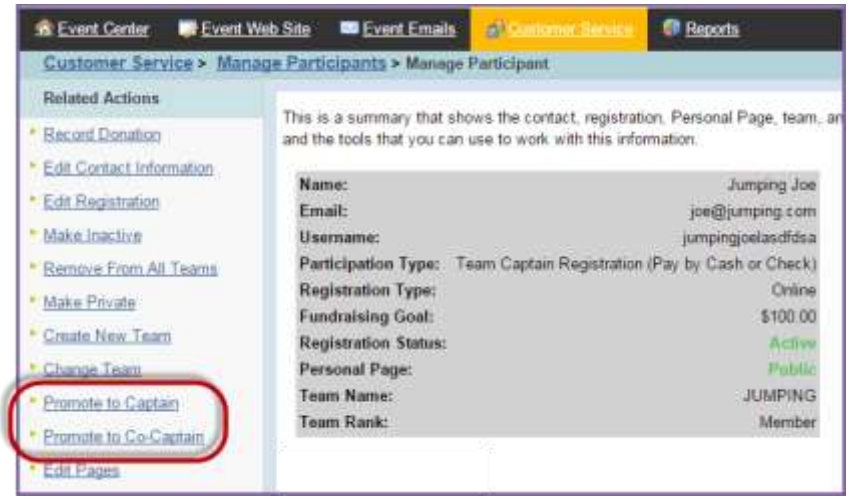
1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Participants**.



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

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.



5. From the participant record, under **Related Actions** (left hand side of the page), click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
    a. Click **Finish** to save the change of leadership.

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

Chapter 8: Customer Service – Manage Companies

- Add a Local Company
- Edit the Contact Information for a Local Company

Relay For Life is a community event. However, companies may also be involved on the Relay website when teams and participants affiliated with the corporates register. The Online Chair may ensure those corporate groups are supported and recognized.

Add a Local Company

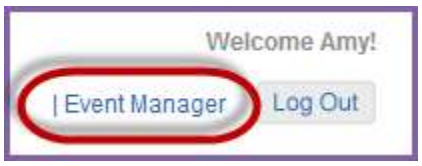
If you have corporate teams participating in your Relay For Life event, you can create a company record in the Event Management Center. Once the company has been added to the website, anyone who registers as a team from that company will be able to select the business name from the 'Company' dropdown during the Team registration process.

National company supporters are automatically included in the Relay website so you do not need to add those.

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

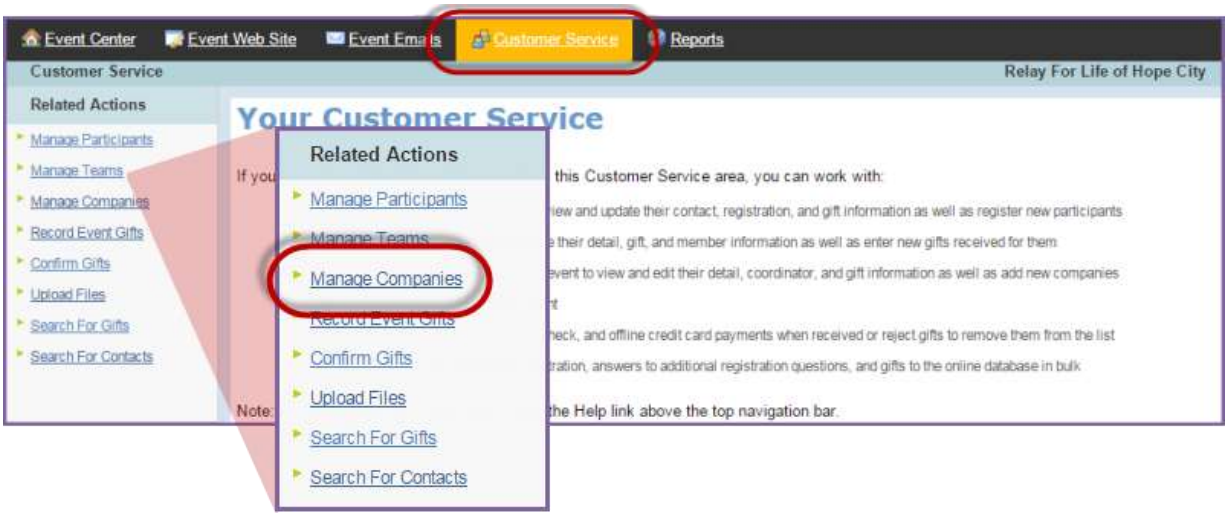
2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

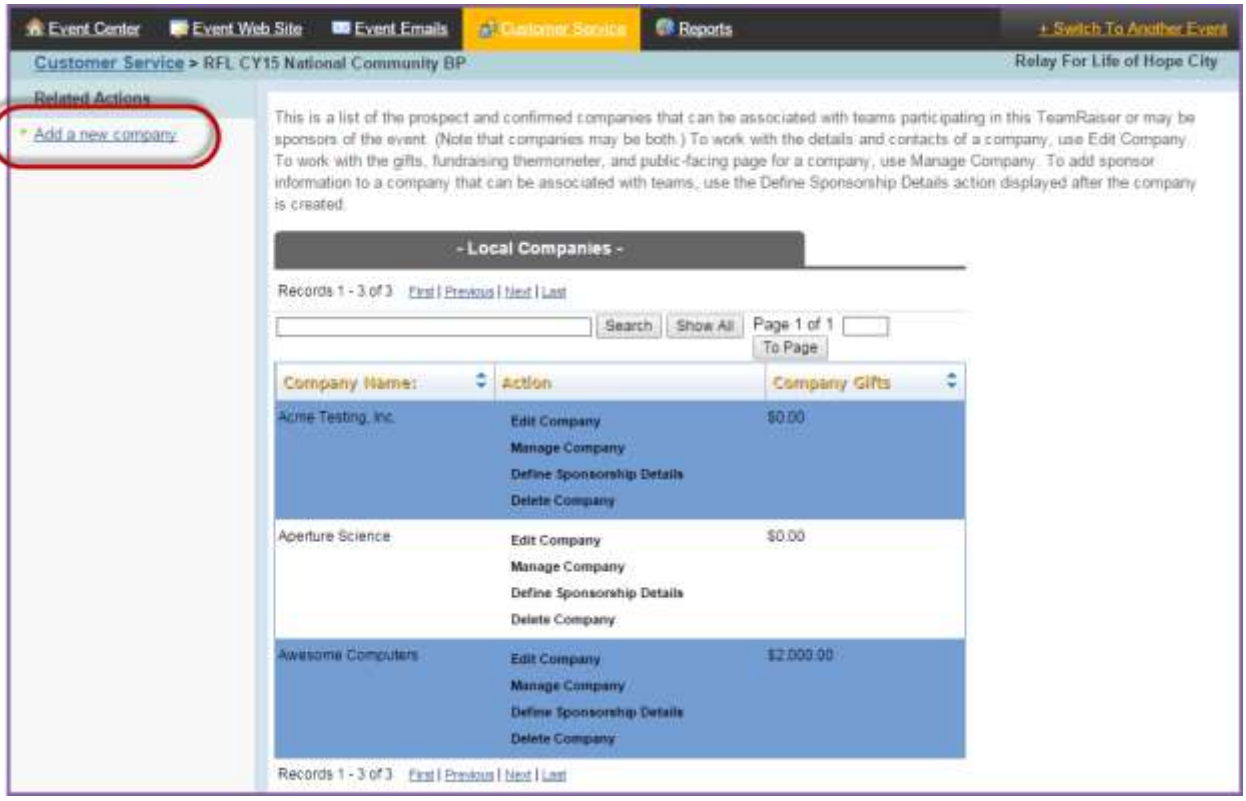


4. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

5. Under Related Actions, select **Manage Companies**.



6. A list of all local companies will be displayed. To add a new company, under **Related Actions** (left hand side of the page), click **Add a New Company**.



7. Complete the following:

A. **Name and Notes:** Complete the required fields (marked with an asterisk below)
   i. *Company Name
   ii. Notes – you may want to use this field to identify this event as a sponsor. Content added here will not appear on the website, however it may be helpful for other event managers to have that information.
   iii. You can skip questions 3-5 (Company Hierarchy Options, Company Priority and Number of Employees)
   iv. *New Company to this TeamRaiser
      a. If the company is new, leave the box checked
      b. If they are a returning company, you can uncheck the box
   v. Additional Custom Company Detail 1 and 2: Enter any additional information. This information will show up in reporting on the company.
   vi. Internal Staff Contact: Name of the person first contacted at the company.
   vii. Volunteer Manager: Name of the volunteer who will work with the company.
   viii. For the Participation Status, check confirmed, as you should only complete this process when you have a sponsor commitment form and the donation associated with that commitment in hand.
   ix. Click **Next**

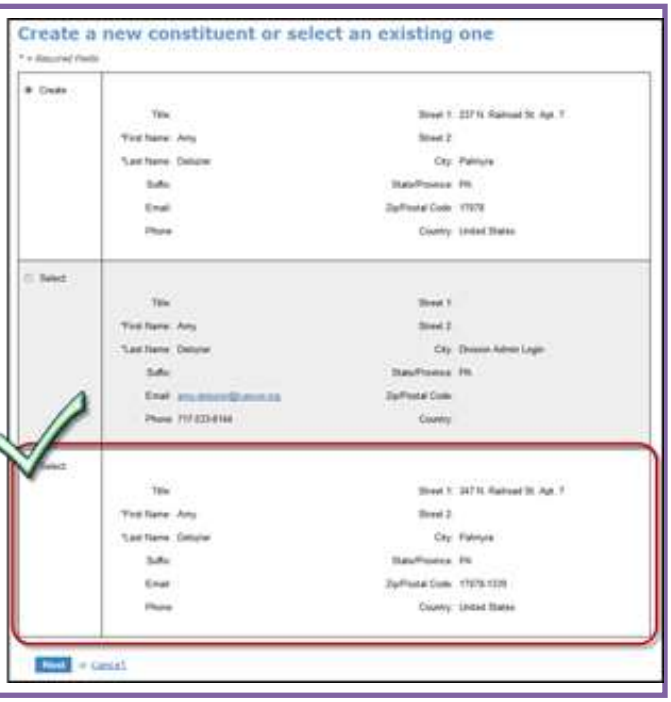
B. **Identify Company Coordinator:**
   i. Fill in the company coordinator contact information
   ii. Click **Next**

NOTE: *Upon clicking Next, you may see this screen.*

If the company coordinator has participated online in an American Cancer Society event before, the system will match the participant details you entered with an existing record.

Verify the participant details against the existing record(s), select the correct record and move on by clicking Next

If this is a brand new constituent who has never registered online for an American Cancer Society event, or if you are not positive that one of the displayed options is a match, you can create a new constituent and move on by clicking Next.



C. **Identify Executive Champion** (Optional):
   i. Fill in the contact information for a person from the company who can be contacted for information and questions about general company involvement.
   ii. Click **Next**

D. **Review Summary**:
   i. Review the details of your company
   ii. Click **Finish**

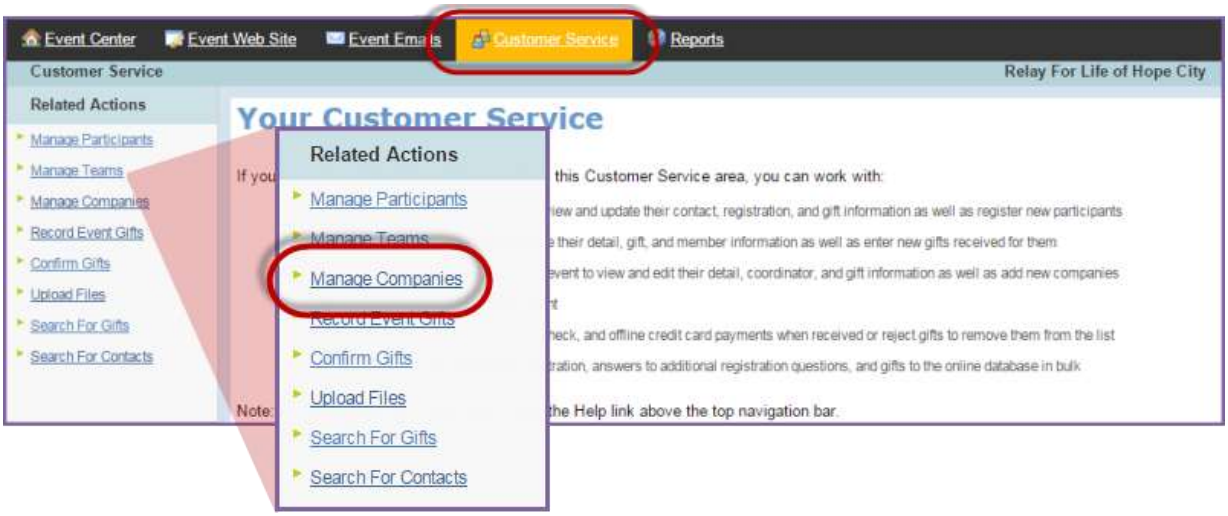
8. Once you click 'Finish' the new company will appear in your Local Companies List, and will be available for teams to select during the registration process.

Edit the Contact Information for a Local Company

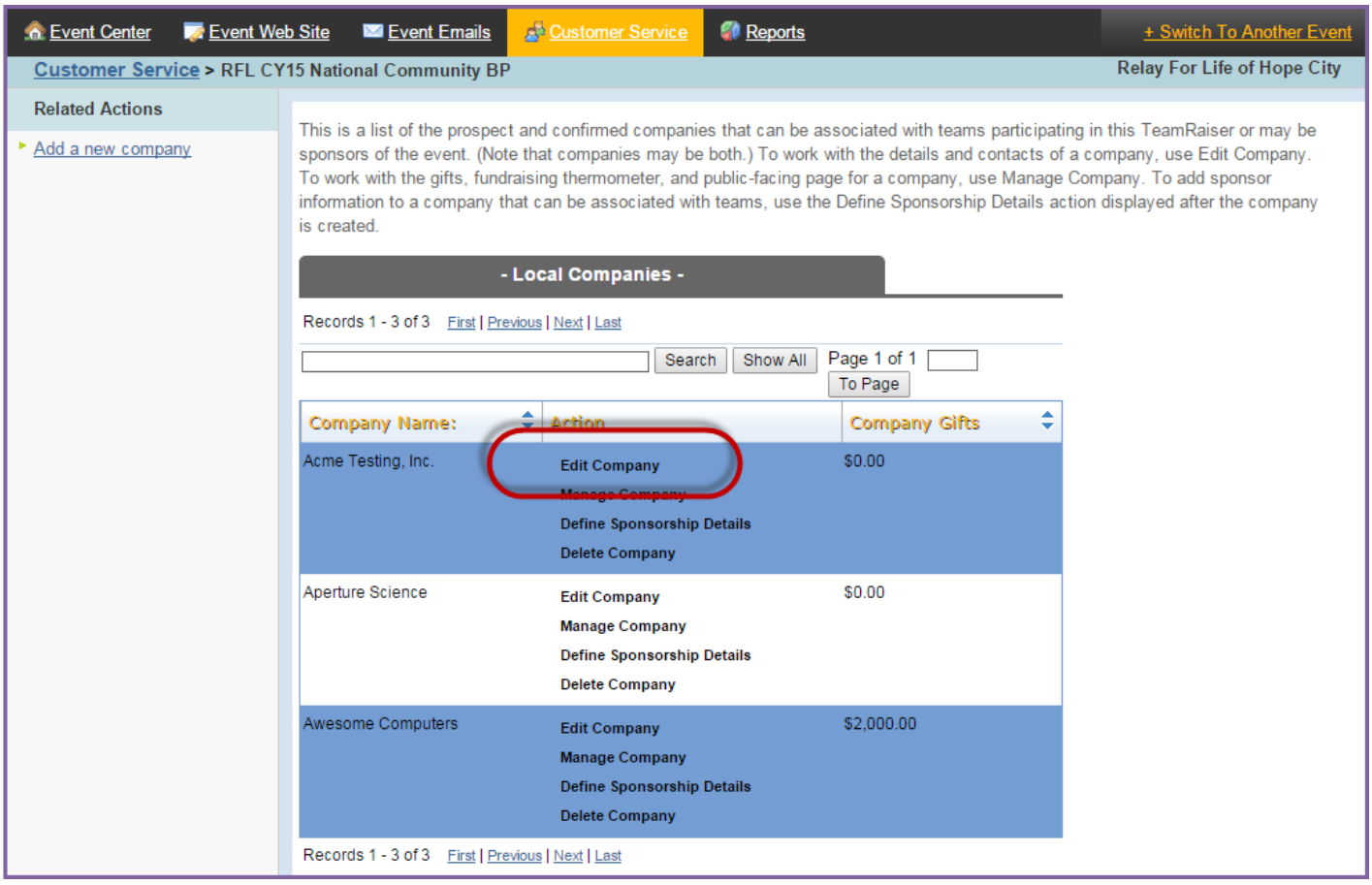
Once a local company has been added to the Event Manager Center, the Online Chair may update the company's information.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Manage Companies**.



3. A list of all local companies will be displayed. Find the company for wish to update. Click **Edit Company**.



4. Follow the progress bar on the left hand side of the page to edit company information.

See Appendix G for the complete Offline Sponsorship Guide.

Chapter 9: Customer Service – Manage Gifts

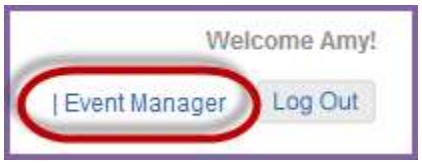
- Search for Gifts
- Change the Honor Roll Scroll on a Participant's page
- Move the Credit of a Donation to another Participant or Team
- Refund a Donor's Gift

Search for Gifts

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

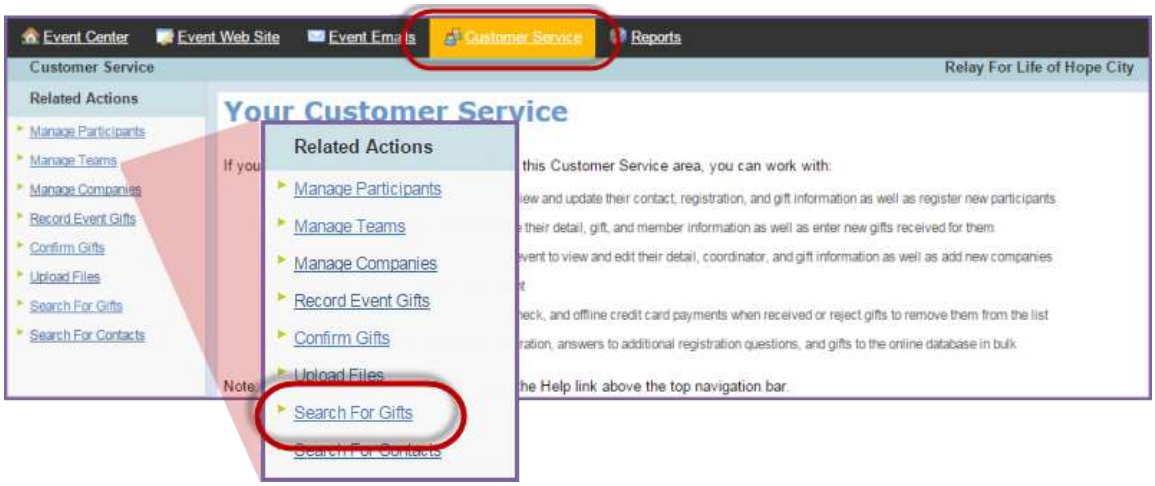
2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

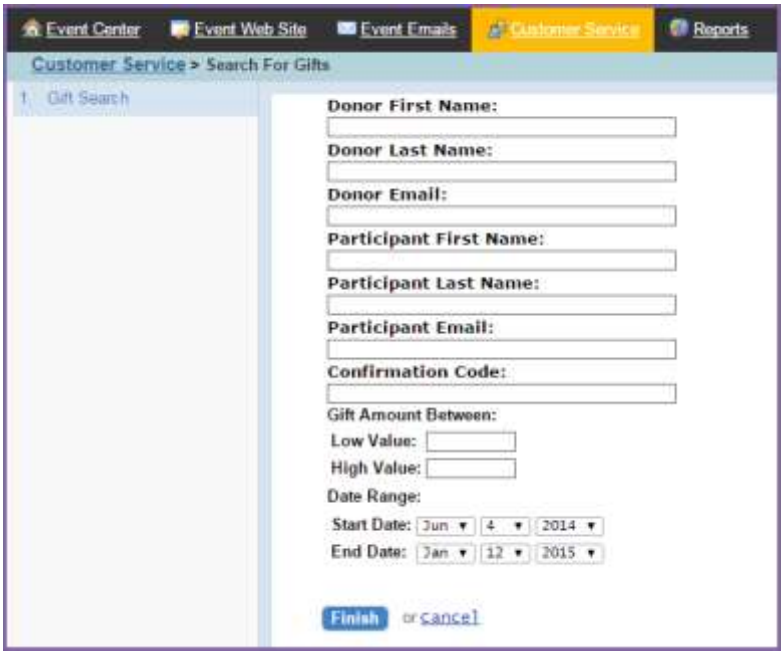


4. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

5. Under Related Actions, select **Search for Gifts**.



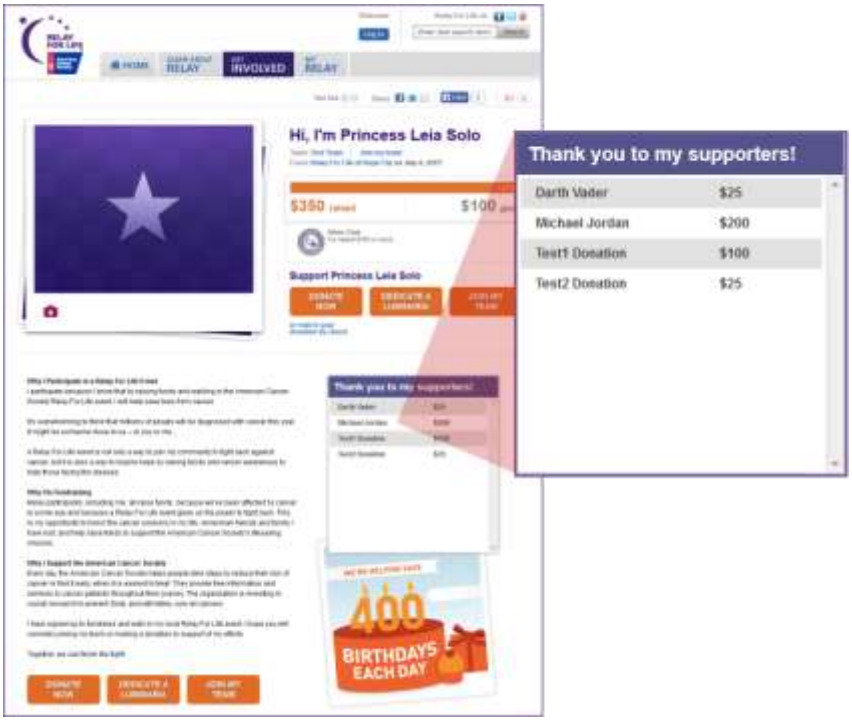
6. Enter any information you know about the donor and/or donation, including:
   a. Donor's first / last name or email address
   b. Participant's name who the donation is credited to
   c. Confirmation code of the donation as listed on the gift receipt
   d. Value of the donation
   e. When the gift was made online
   f. Use % for wildcard. Example: Jon% if you are trying to find Jon or Jonathon



7. Click **Finish** to perform the search.

Change the Honor Roll Name on a Participant's Page

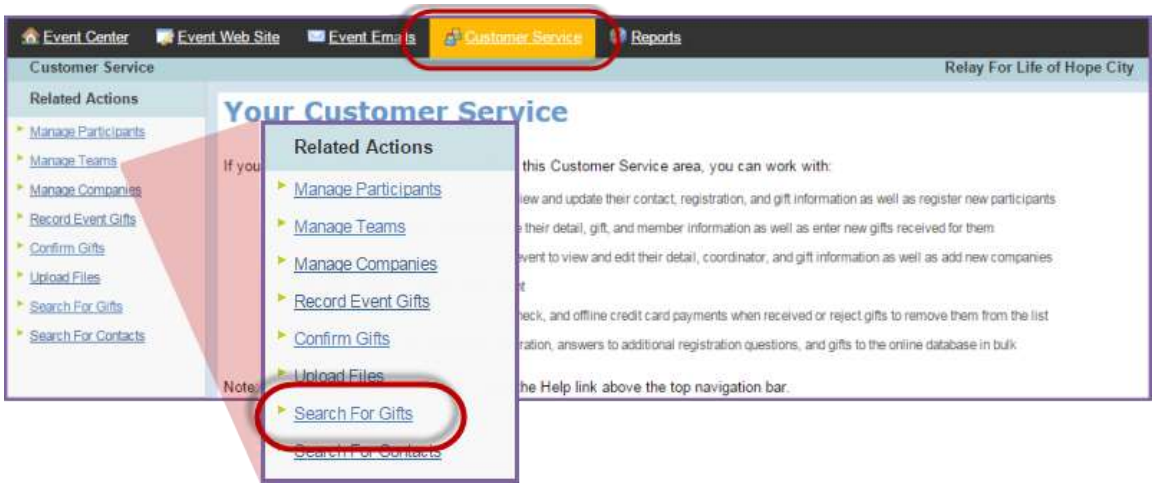
The Honor Roll recognizes donors and their contributions on the Relay For Life participant's personal pages.



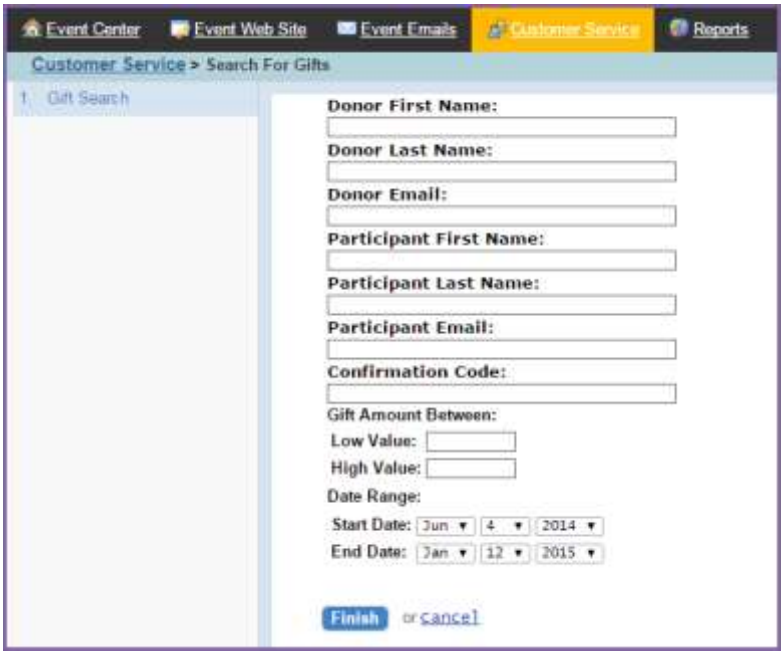
Some donors may choose to be referred to by a different name or to remain anonymous. As the Online Chair, you may update how the donor and donation is displayed on each participant page.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

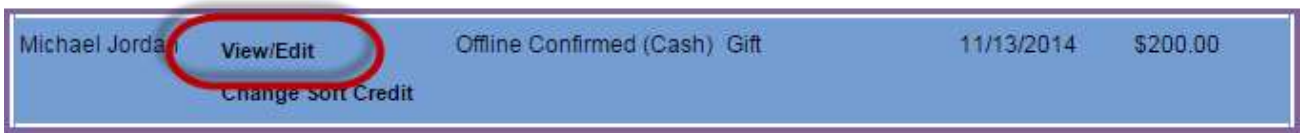
2. Under Related Actions, select **Search for Gifts**.



3. Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.



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

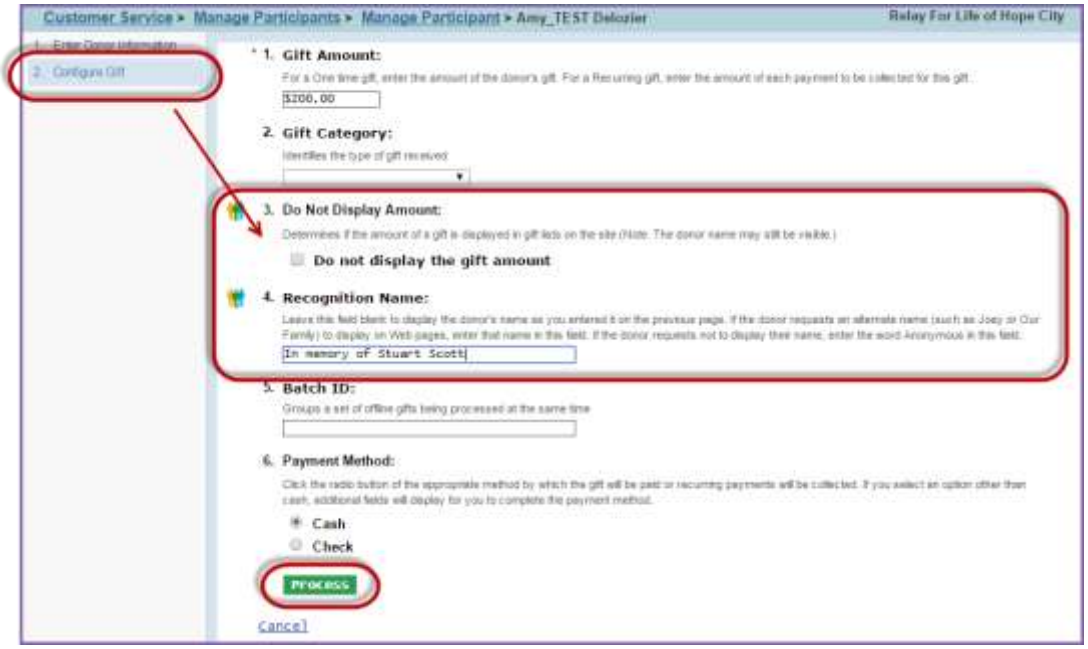


5. Skip to step **2. Configure Gift**

6. Specify and update the necessary information:

a. **Do Not Display Amount**: Check the box beside "**Do not display the gift amount**" if the donor does not wish to have his/her donation amount displayed publically on the personal page.
b. **Recognition Name**: If this field is left blank, the Recognition Name is defaulted to the donor's Name, but you can update the donor's name as s/he wishes it to appear on the Honor Roll. If the donor wishes to remain anonymous, enter "Anonymous" in the field provided.

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



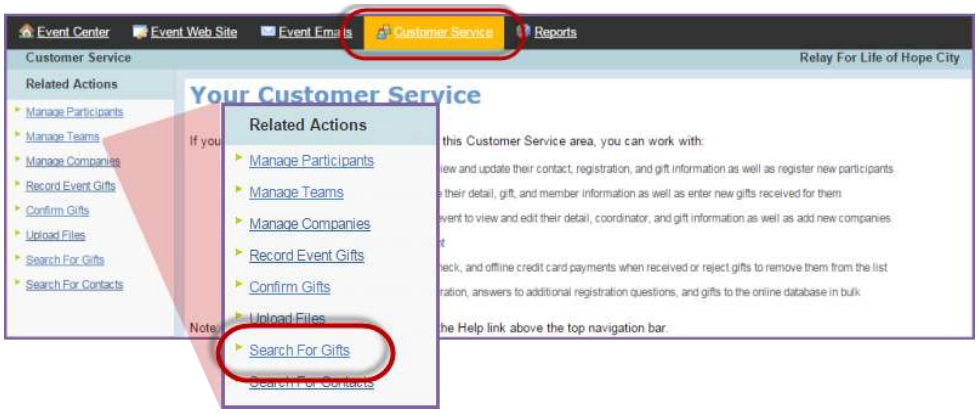
Move the Credit of a Donation to another Participant or Team

While all donations made on your Relay For Life website support the mission of the American Cancer Society, gifts may be credited to the event, team, or participant level. As the Online Chair, you may move the credit of a donation to the proper person or team based on the donor's intent.

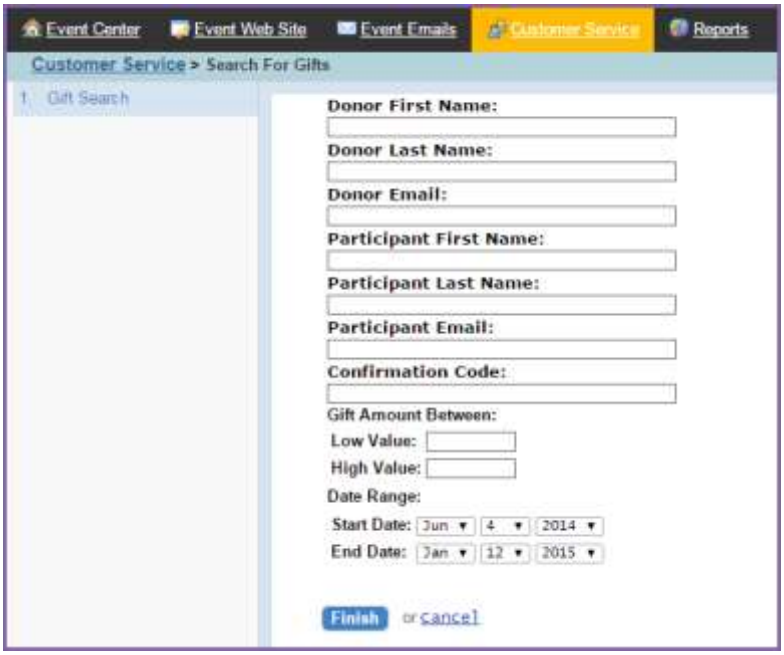
***Note**: If you don't know who the donation is credited to initially, you may search for the gift through the Manage Teams or Search For Gifts area (search by donor name). You may also run a donation report to find the donors name and where the gift was initially given.*

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

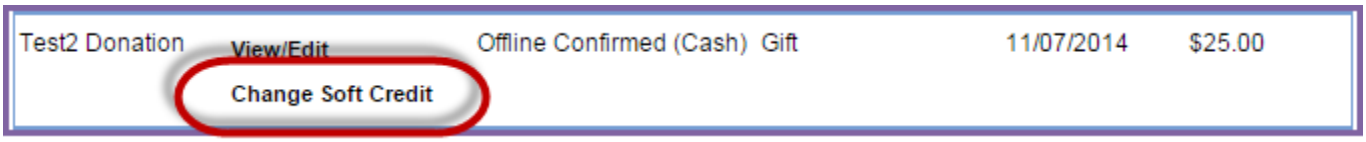
2. Under Related Actions, select **Search for Gifts**.



3. Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

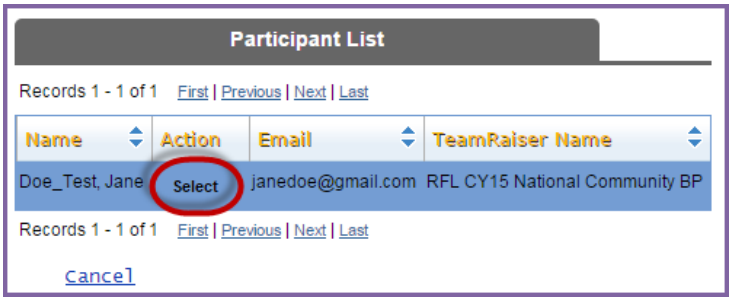


4. Beside the gift you wish to move, click the **Change Soft Credit** link.



5. Identify who will receive credit for the donation. You can adjust the gift credit to a participant, team, or the general Relay For Life event. Click the appropriate **radio button** before clicking **Search for Recipient**.

6. Identify the recipient of the donation through the list provided or through a search. Click **Select** next to the person or team to whom you are reassigning credit for the donation.



7. **Confirm Changes**: Review the transaction information and the change in soft credit before confirming. If it is correct, click **Finish** and the credit of a donation will be moved.

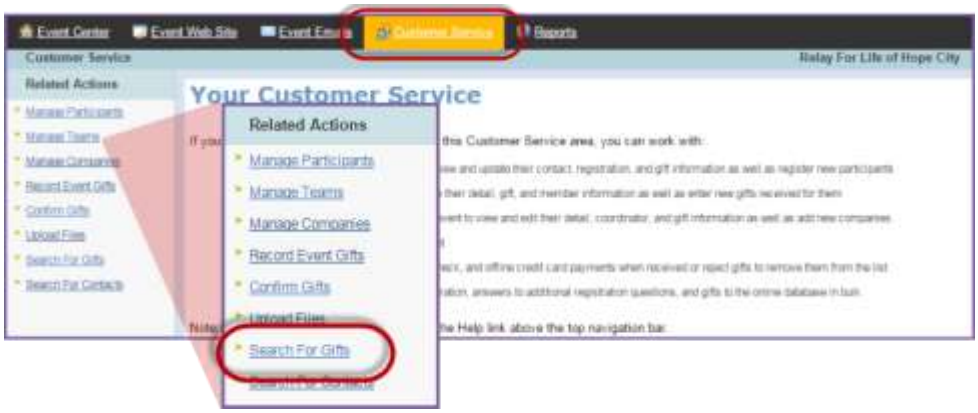
Note: *Changing the soft credit of a donation will only be reflected on the Relay website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please contact the National Cancer Information Center at1-800-227-2345 (option #2), which is staffed from 6 a.m. to 11 p.m. CST.*

Refund a Donation

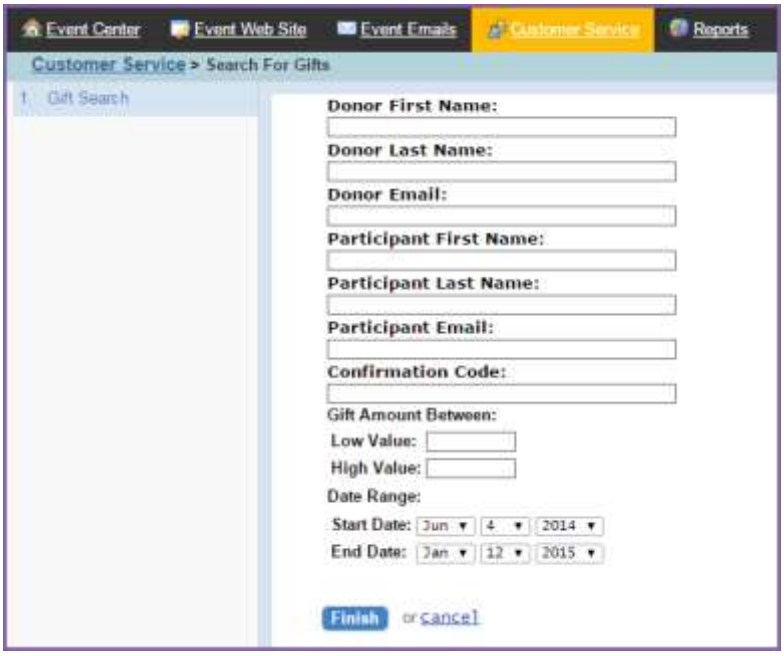
As the Online Chair, you may be requested to refund part, or all, of an online credit card gift.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

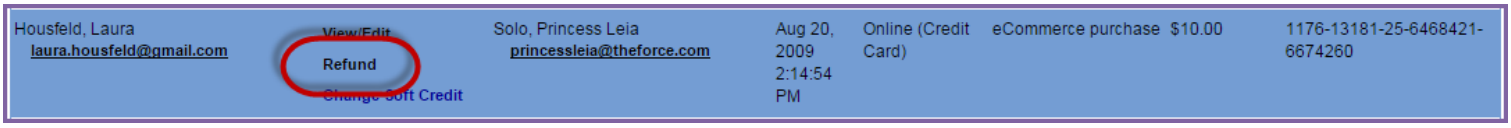
2. Under Related Actions, select **Search for Gifts**.



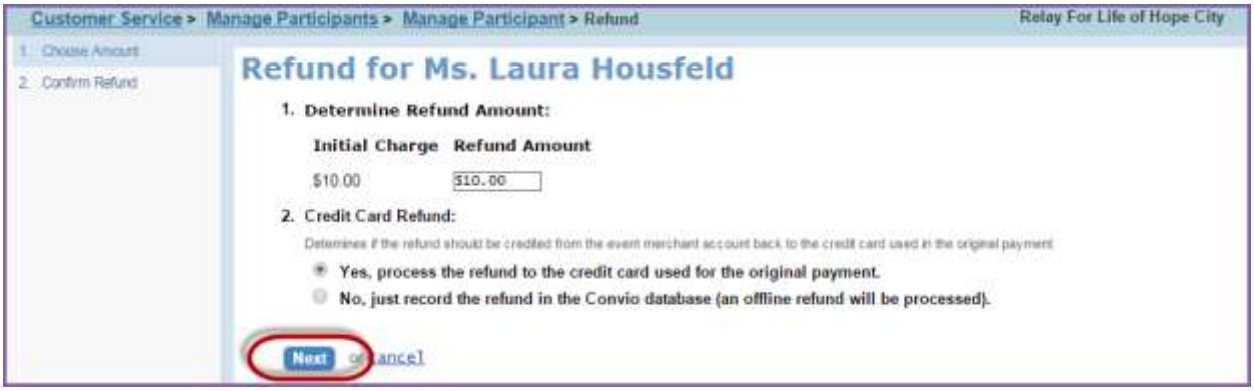
3. Enter any information in the search fields provided; enter the available information about the donation. Click **Finish** to perform the search.



4. Beside the gift you wish to move, click the **Refund** link.



8. **Enter the amount** that you wish to refund to the donor.
    a. Leave refund amount field 'as is' if you wish to process a full refund.
    b. You can enter a smaller amount if the donor only wish to have a partial refund (ex. They entered $100, when they meant to only enter $10. You will refund $90)
    c. Confirm that the gift is to be **returned to the initial credit card** before clicking **Next**.



9. Click **Finish** to confirm the refund.

Chapter 10: Event Manager Center – Reports

- Access Reports
- Run and Download Reports
- Utilizing the Report Results Tab
- Accessing Past Event Manager Centers and Reports

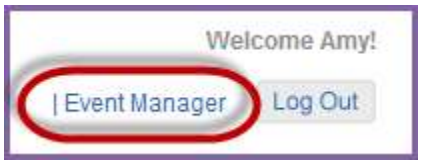
Through the Event Manager Center Report section, you may track the success of your team building and fundraising efforts online.

Access Reports

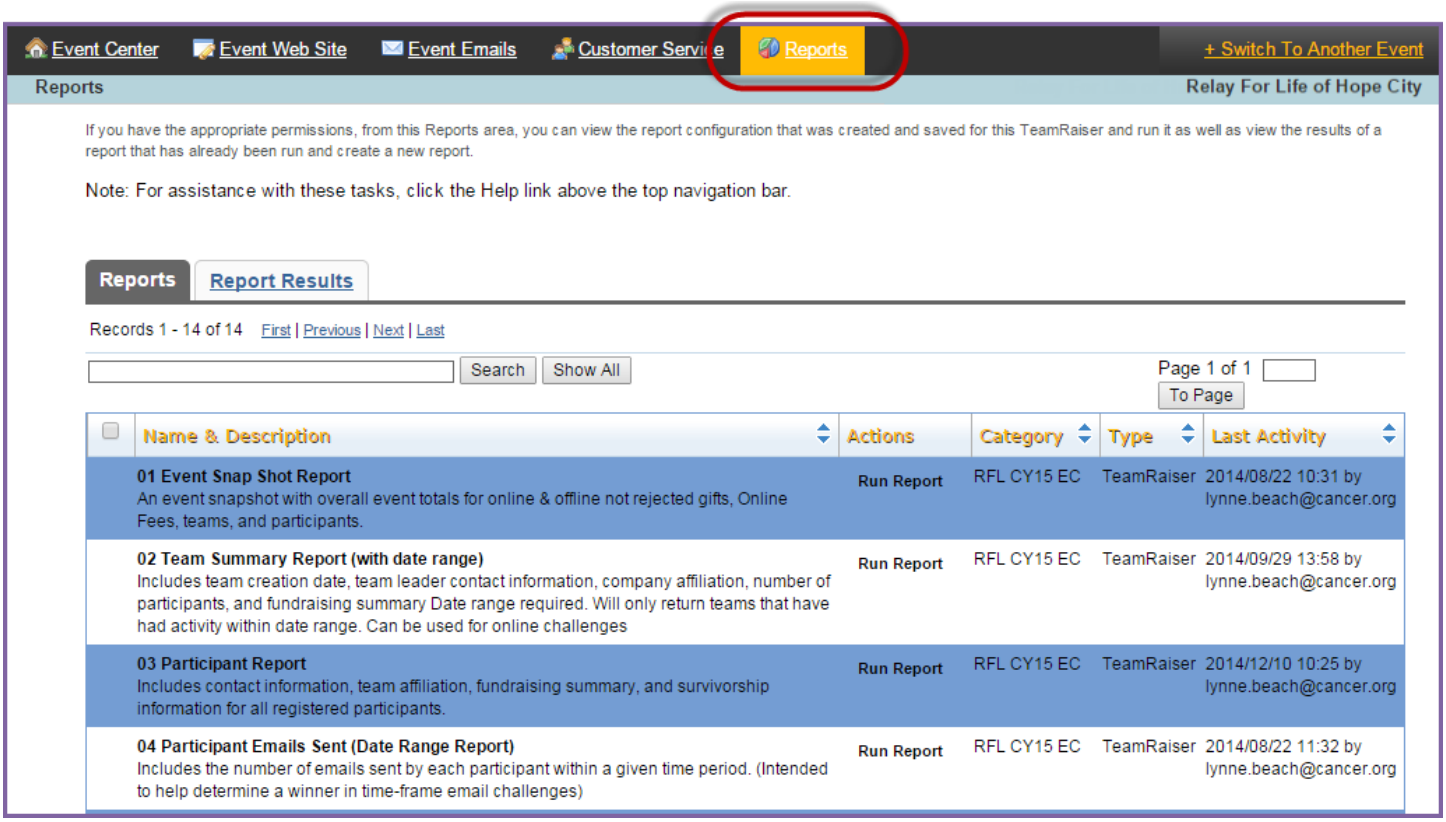
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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



4. From the Event Management Center, click **Reports** in the top Navigation Bar.



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

See Appendix H for a Comprehensive Reports Guide.

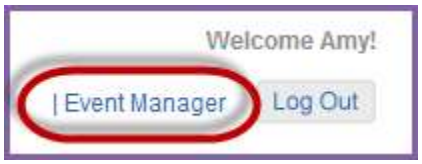
Run and Download Reports

To monitor the success of your Relay website, you may run and download reports from the Event Manager Center.

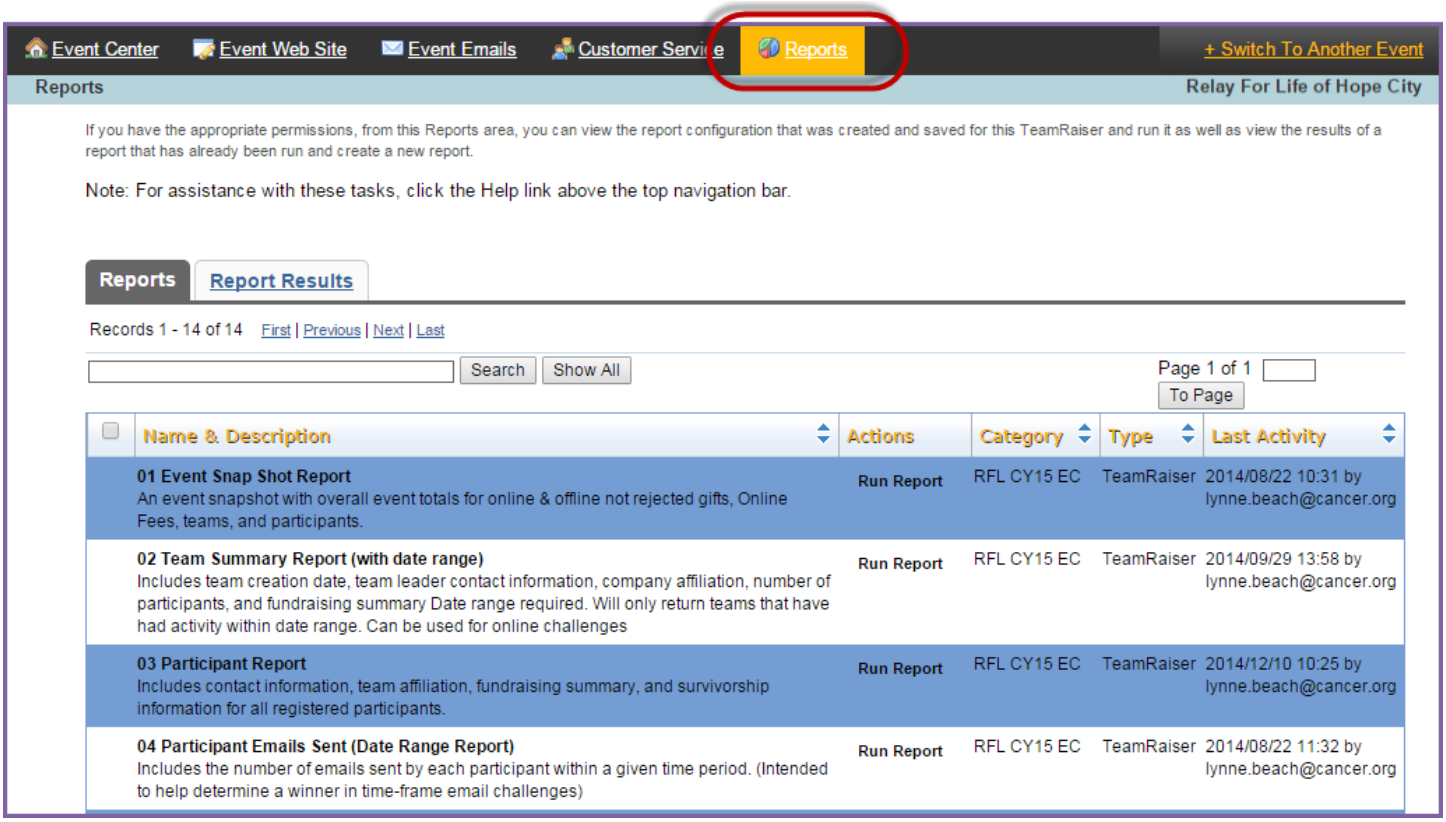
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

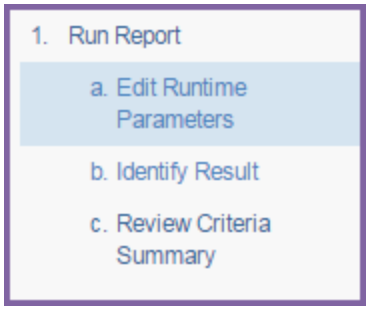


4. From the Event Management Center, click **Reports** in the top Navigation Bar.

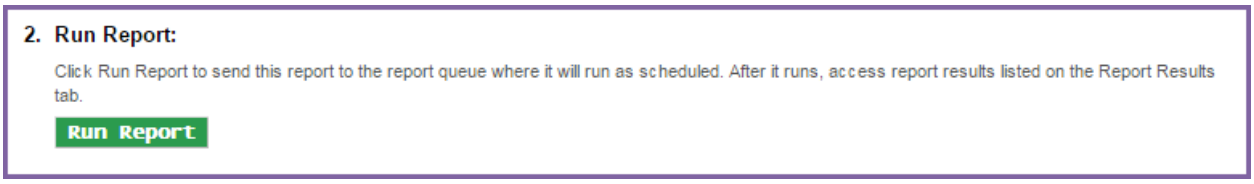


5. A list of all available reports will be displayed. Locate the report you would like data from. Click **Run Report** under the Action column beside the appropriate report.

6. Follow the prompts and the Process Navigator on the left hand side of the page will help navigate you through the reporting process.



   a. Step 1a – **Edit Runtime Parameters**: If the report has been built to allow for a custom date range, enter the parameters for which you would like to gather data from. *Most reports do not have editable parameters and therefore, you will not see this step.*
   b. Step 1b – **Identify Result**, specify the **Report Label** (a name to help identify the results) and if desired a **Report Description** before clicking **Next**
      i. If you manage multiple events, you may want to add the Event Name to the Report Label, so you can easily identify results from one event to the next.
   c. Step 1c – **Report Criteria Summary:** Review the report summary page and click **Run Report** at the bottom of the page to begin the data collection process.



7. The report will display as soon as the task completes. The following actions will be available:

   a. **Download:** Click the disc icon to download the report in any of the following three formats:
      i. CSV – comma separated values format. **This is the best format to use.**
      ii. PDF – Adobe Acrobat portable document format
      iii. HTML – hypertext markup language format
   b. **Print**: Click the printer icon to print the report results to your printer.

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

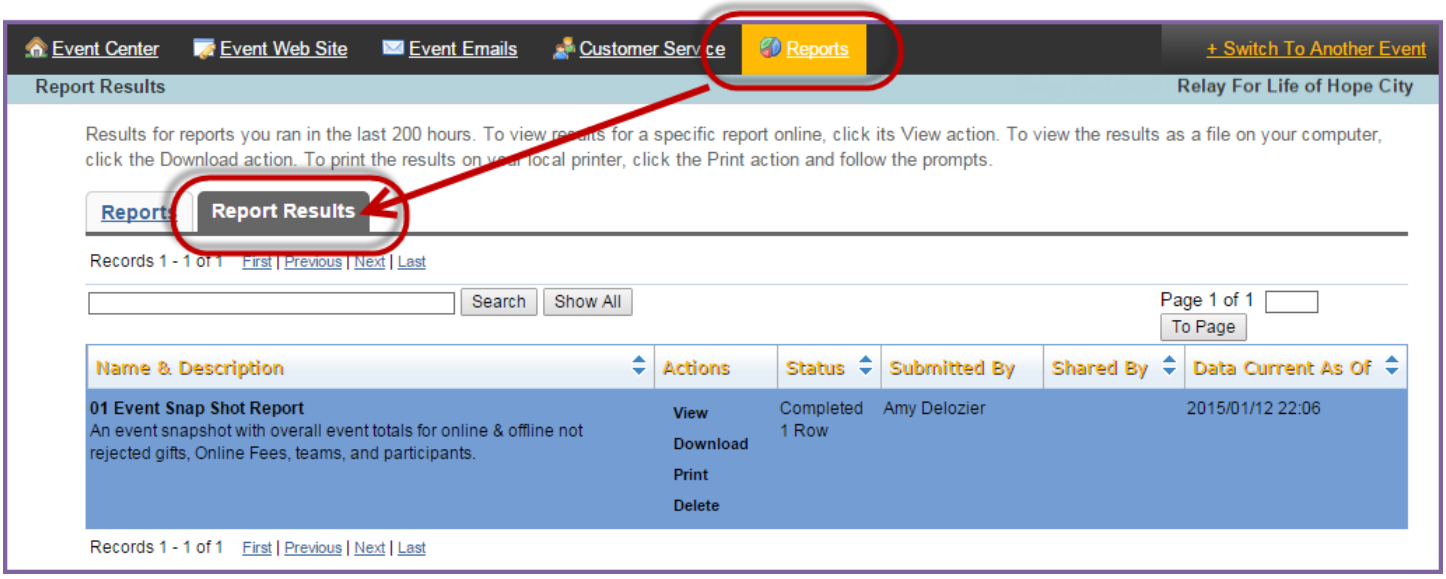
Utilizing the Report Results Tab

By clicking the **Report Results** tab, you can access a list of those reports that have already been run from your Relay For Life website. From this list, you may retrieve the date from reports that were run previously or took a longer time to appear on screen.

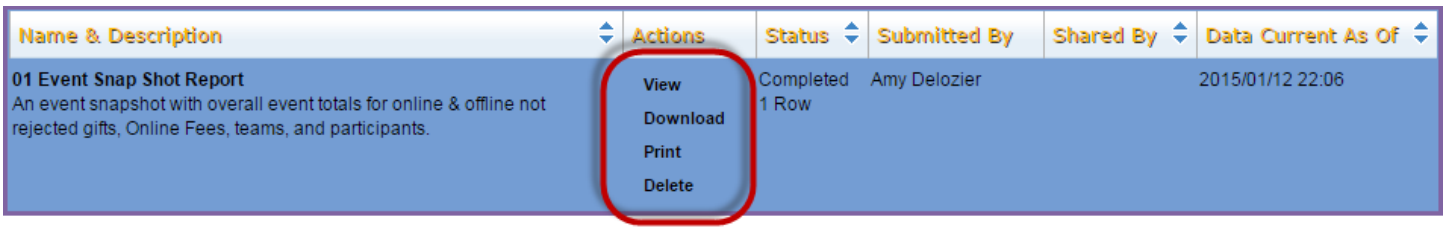
1. From the Event Management Center, click **Reports** in the top Navigation Bar.

2. To review the results of the reports that you have previously pulled, switch to the **Report Results** tab.

3. The **Report Results List** page will display and display those report which have been generated from your Relay For Life website.
   a. Reports will only be saved in the Report Results tab for 200 hours after first being pulled.



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



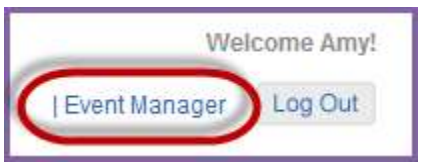
Accessing Past Event Manager Centers and Reports

Prior year online reports and participant information are not carried over to the current Relay For Life website and Event Manger Center. However, you may still access the previous year's Event Manager Center to find your needed information.

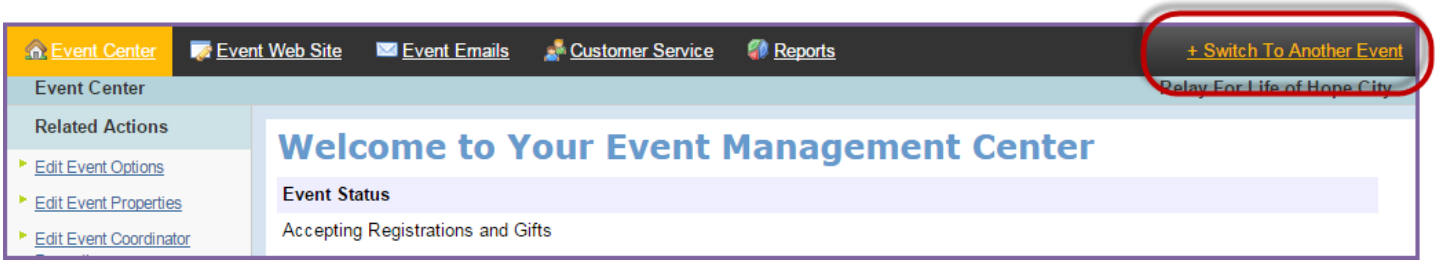
1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page.

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

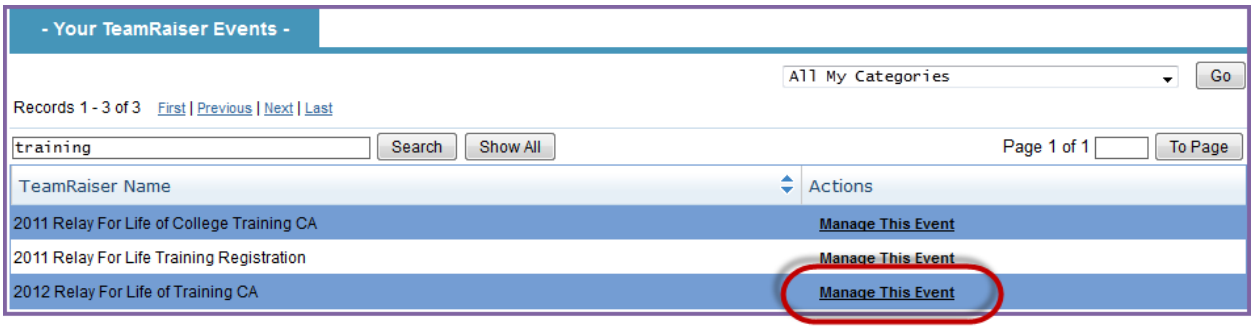


4. From the Event Management Center, click **+ Switch To Another Event** in the top Navigation Bar.



5. Use the search function to find the past event you want to access data for.

6. Click **Manage This Event** beside the event you wish to access.



7. You will be directed to the prior year Event Manager Center from which you may pull reports or access previous participant information.

Note: *Your prior year Relay For Life event will only appear in this list if you were an Event Manager from that year. If you are new to the role of Online Chair and did not have access to the Event Manager Center previously, please contact your staff partner for log in permissions.*

Appendix A: EMC Access for Staff and Volunteers

The process for training new staff and online chairs has been centralized and is now managed by the new Talent Strategy training team. Moving forward, the new Event Management Center (EMC) access process will require ALL Event Managers (both staff and volunteers alike) to review two EMC training videos before receiving EMC access to their online website.

Staff should follow the following process:

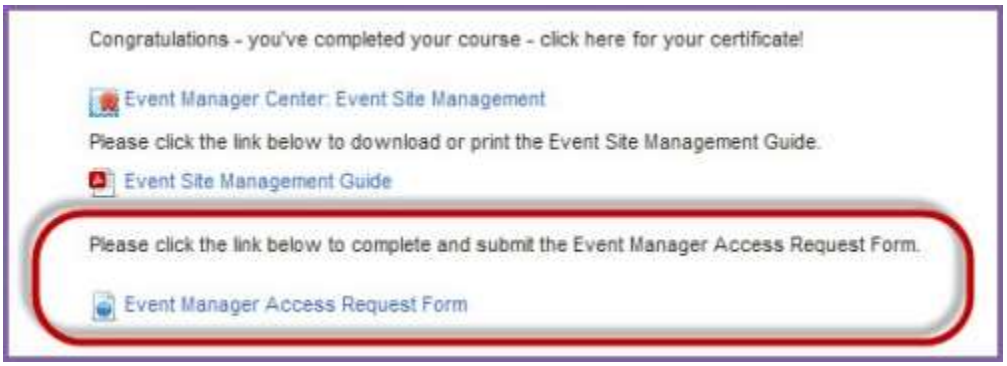
1. Log in to Society Source
2. Under Employee Services, click on Access: Learning
3. Under the 'Learning Tools' menu, click on the Society Pathways link
4. Launch Society Pathways, and locate the webinars by searching for 'Event Manager' – there are two: one on Event Site Management, and one on Participant Management (NA 1000 'Courses')
5. Select 'Start' to launch either course
6. Upon completion of the training module, staff will need to complete the EMC Access Request Form. Users will receive access within 2-3 business days.

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

Full online chair volunteers should follow the following process:

1. Go to the Volunteer Learning Center https://volunteerlearning.cancer.org/
2. Log in if you are a returning volunteer, or register to create a new account
3. Click on Find Courses
4. Find the webinar you want to listen to by searching for "Event Manager" – there are two: one on Event Site Management, and one on Participant Management
5. Select Yes to enroll in either course
6. Once in the course you can listen to the webinar and/or download the training guide
7. Following the completion of the training module, the volunteer will need to complete the EMC Access Request Form. They will receive access within 2-3 business days.

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



Appendix B: Submitting Event Changes

What to submit through EMT: If you are requesting a change to the event details (date, time, location, staff partner, etc.) the change should be submitted by ACS staff through the portal in EMT, and the SSBC team will make those updates in all systems. (You should also use the EMT portal to submit a request for a new event website, event email campaign, or a report that is not currently available in the EMC.)

As you are completing the customization process, if you find that any event details are incorrect, you will need to follow the formal process to submit the changes so they can be made in all databases.

1. Log into EMT
2. Scroll down to the 'Resources' section
3. Click the Update an existing event link
4. This link will take you to the Event Change Request Form
5. Complete and submit this form. Please fill out all required fields, and be very specific about the change(s) you are requesting.

What to submit through helpme.cancer.org: If you are requesting a change to a national business standard (registration fees, luminaria, discount codes) you should submit a ticket at http://helpme.cancer.org, as those updates can only be made by third level support.

This is broken out in more detail in the power point deck from the Website Customization and Support training. We advise reviewing the support piece from the training if you have any questions about where to submit your change! Submitting it through the correct process will ensure you get a faster resolution!

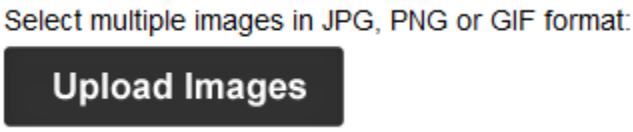
Appendix C: Create, Animate and Upload Sponsor Logos to your Greeting Page

Create and Animate

Visit http://gifmaker.me/ - this site will allow you to scroll up to 30 logos!

> ***The benefit of using Gifmaker.me is that the scrolling logo file gets uploaded into your event library, and becomes the property of the ACS. Should the Gifmaker.me site go down at any point, the scrolling logo file will be unaffected because it's already in your library!*

Click the **Upload Images** button to begin adding your images.

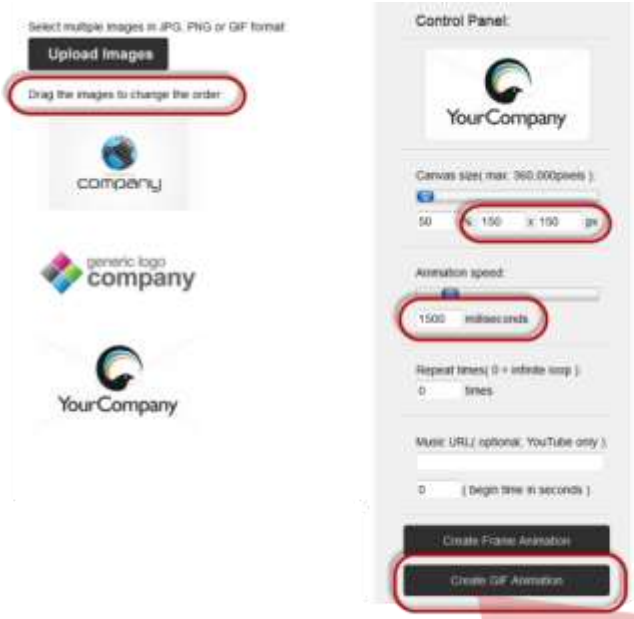


Locate the folder on your PC where you have your sponsor logos saved. You can upload them all at once by highlighting all logos and click **Open**.

Once uploaded, they will all appear in the preview pane. You can drag the images to re-order them if you wish.

In the Control Bar:

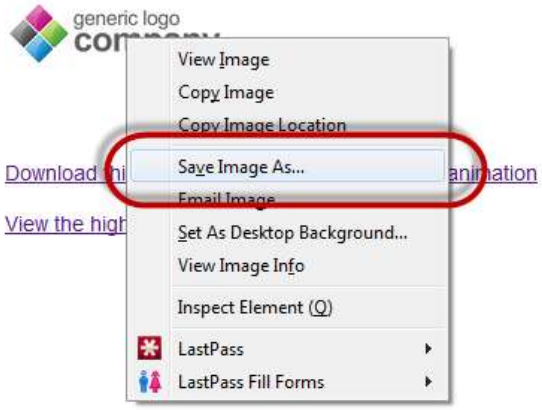
- Adjust the canvas size to **150x150**
- Adjust the animation speed to **1200-1500 ms** (based on your preference)
- Leave the 'Repeat times' at 0, to allow for infinite looping.
- Leave the 'Music URL' blank
- Click **Create GIF Animation**



Once created, a variety of new options will appear. Select to **View the GIF animation**.

Verify that the sponsor scroll looks the way you want it to. If it doesn't, return to the GIFmaker site and make your desired edits.

Once the sponsor scroll looks the way you want it on the **View the GIF animation** screen, right click on the image and select **Save Image/Picture As** *(exact language may vary depending on browser type)* and save to your PC (GIF file type).



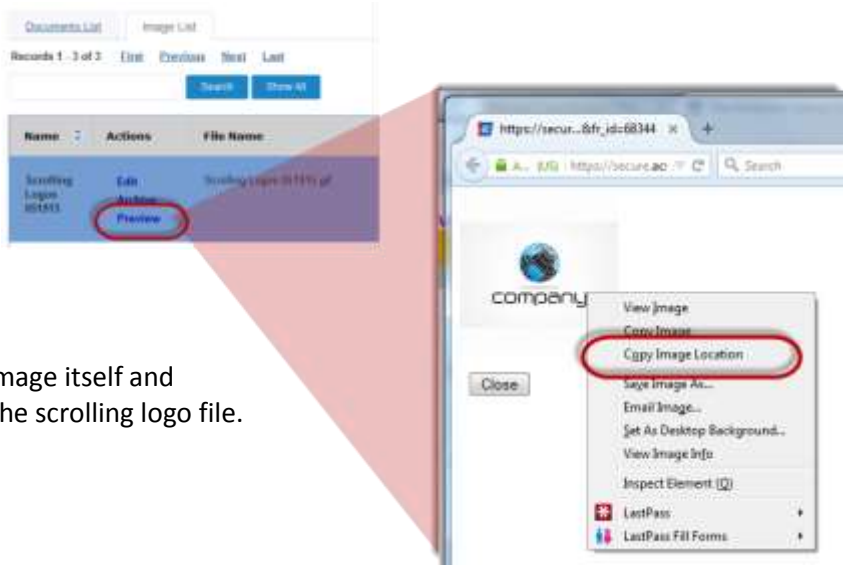
Upload Animated Gif to Event Home Page

> ***Note:*** *When you upload sponsor logos into your image library, you will see a check box to identify them as a sponsor logo. PLEASE do not check the box. We have repurposed the sponsor logo checkbox to allow for local event photos on your Greeting Page, and any images with that box checked will appear in your media wall. Learn more about the new Media Wall feature here.*

Upload the animated gif file you just created to the image library.

From the **Event Center** go to **Manage Event Library**, then the **Image List** tab. **Select Upload New Image** and find the animated logo file you've just created. **Upload** then **Finish.**

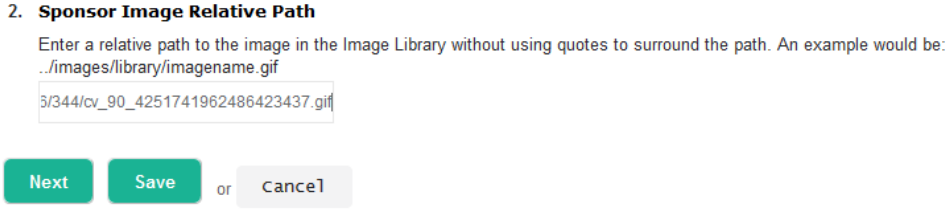
Once you are taken back to the **Image List** tab, click on the **Preview** link, and a new window will open with a preview of your scrolling logo image.



Within the preview pane right click your mouse on image itself and select **Copy Image Location**. This copies the URL of the scrolling logo file.

From the **Event Center** go to **Edit Event Options**, then **4. Edit Advanced Options**. Paste the URL you just copied into **Sponsor Image Relative Path**.

Click **Save** and the scrolling logos will now appear in the Sponsor space on your greeting page!



Appendix D: WYSIWYG Basics and HTML Quick Sheet

WYSIWYG (an acronym for *What You See Is What You Get*), is an HTML editor in which content displayed during editing appears very similar to the final output on the web page. **HTML** (*Hypertext Markup Language*) is the simple markup language of the World Wide Web; pages you view on the Web are written in HTML. The WYSIWYG transforms the text and formatting you enter into HTML.

Event Managers can use the WYSIWYG to format both webpages and email content. Here are a few helpful tips for using the WYSIWYG to edit your web pages in the Event Management Center!

- DO NOT - Copy and paste from other applications (Word, Publisher, Emails, etc.) directly in to the WYSIWYG. This will cause the HTML to become "confused" on how to interpret the formatting of the text and it will not render correctly on the front-end of your website.

  INSTEAD - Copy and paste the text into Notebook FIRST. Then you may copy and paste from Notebook into the WYSIWYG. Notebook will strip the formatting of the text so that it renders properly on your website – once the text is in the WYSIWYG, use the links at the top to format your text.

- No links to non-ACS sites (policy rule). Links to RFL.org and Cancer.org are fine.

- No bank nights, please. These sites are public and are searchable by anyone with access to the internet. For your safety and the safety of your volunteers, please do not put "Bank Nights" on the sites.

- When editing your web pages…
  Enter = paragraph return (double space)
  Shift+Enter = character return (1 space)

- Resize images before uploading them. Images will have better resolution.

- Image size recommendations:
  (Images that are not resized properly will stretch the width of your website and/or cause the page to load improperly)
  - Main image on home page: no larger than 500 pixels in width
  - Main image on a custom page: no larger than 550 pixels in width
  - Pictures: no larger than 300 pixels in width
  - Sponsor logos: 250 pixels in width
    (You may wish to recognize larger sponsors with a larger logo presence on your web page, and smaller sponsors with a smaller logo size)

- Upload documents & images to your event library first!
  Then you can easily drop them in to your custom pages using the WYSIWYG icons.

WYSIWYG BASICS

(Bold icon) to display the selected content in bold typeface

(Italics icon) to display the selected content in italics typeface

(Underline icon) to display the selected content with an underline

(Cut icon) to cut selected content from the WYSIWYG and paste it to the clipboard

(Copy icon) to copy the selected content to the clipboard

(Paste icon) to paste material from the clipboard, or if text is unformatted, you can use this paste icon

***Note**: If pasting material from another application such as Word, it is recommended that you first save the material as "text only" or copy it into an application such as Notepad to strip the existing formatting - then reformat the text in the WYSIWYG. If you try to keep the original formatting, the appearance may be acceptable in the WYSIWYG but may be interpreted very differently in the user's browser window.*

(Paste as Text icon) If the text is formatted, you should use this paste icon, which recognizes HTML tags will try to display them correctly in the view.

(Paste from Word icon) If text is from a Microsoft Word document, you should use this paste icon to paste content correctly into the window without the Microsoft Word tagging or formatting.

(Undo icon) to undo the last action

(Redo icon) to restore the last action that was undone

(Find icon) to simply locate each occurrence of some content

(Select All Content icon) to select all of the content in the window at one time

(Remove Formatting icon) to remove formatting from selected content

(Align Left icon) to align selected content on the left side of the page

(Align Center icon) to align selected content in the center of the page

(Align Right icon) to align selected content on the right side of the page

(Numbered List icon) to create a numbered, or ordered, list from the paragraphs in the selected content

(Bulleted List icon) to create a list with bullet points for each paragraph in the selected content

(Indent icon) to indent the selected text, moving it to the right

(Outdent icon) to outdent the selected text, moving it to the left

(Insert Link icon) to create a quick link from the selected text to a document in your document library, another page in your website, an email address, or an anchor

(Remove Link icon) to remove a link from the selected text

(Anchor icon) to place an anchor tag in your content to mark the heading for later use in reference

(Insert Image icon) to insert an image from your image library in to your page content

(Insert Horizontal Rule icon) to insert a horizontal line across the width of the page

(View HTML Source Code icon) If you want to enter HTML tags directly into the source code, open an HTML window by clicking this link and entering text directly into it.

(Text Color icon) to display the color selector that enables you to click another color in which to display the selected content

(Background Color icon) to display the color selector that enables you to click another color in which to display the background color of the selected content

(Insert Table icon) to create and format an HTML table within the WYSIWYG window; to help organize your content

(Table Row Properties icon) to apply changes to currently selected row, odd rows, even rows, or all table rows

(Table Cell Properties icon) to apply changes to currently selected cell, all cells within the row, or all cells in the table

(Insert Row Before icon) to insert a row into the table above, or before, the row that is currently selected

(Insert Row After icon) to insert a row into the table below, or after, the row that is currently selected

(Delete Row icon) to delete the row currently selected

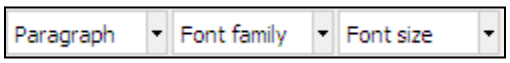
(Insert Column Before icon) to insert a column into the table to the left of, or before, the column that is currently selected

(Insert Column After icon) to insert a column into the table to the right of, or after, the column that is currently selected

(Delete Column icon) to delete the column currently selected

(Split Table Cells icon) to split merged table cells apart into the original row and column configuration.

(Merge Table Cells icon) to merges selected cells together. Note: This option can also be used without selecting any cells, and instead specifying the amount of rows and columns to be merged in a popup window.



(Format Font menus)
To change the format of selected font, change font size and font family

(Personalization)
There are several personalization options available to enhance the experience for your users. To insert a personalization select the one you would like from the personalization popup menu available within the WYSIWYG. You can style the personalization the same way you would any other text.

(Conditional Content) Conditional content is most commonly used in event emails. It allows you to have a greater control over what users have the ability to see within an event email. For instance, you could create a special notice that appears only to team captains (such as team captain meetings), and then display something completely different to regular team members.

To insert Conditional content:

1. Click on the icon in the WYSIWYG.
2. Some options will result in a popup prompt to enter a value to compare against. Enter in the number you want to set as your check point (ie: 50 for 50% of a goal). Set the value and click OK.
3. Your conditional will drop in to the WYSIWYG. Click on the conditional tabs to enter the text you would like to appear when the condition is True, False, or Unknown.
4. To Edit an existing conditional, click on the conditional tabs to edit the text appearing within each conditional statement.

HTML Quick Sheet

HTML stands for **H**yper **T**ext **M**arkup **L**anguage and is the simple markup language of the World Wide Web. The web pages you view on the Internet are written in HTML. This includes page formatting, hyperlinks, graphics, fill-in forms, and multimedia documents.

HTML Tags
HTML works in a simple and logical format. It reads like you do - top to bottom, left to right. Think of tags as making your structure. For example, if you would like to enter a heading on a Web page, you would place a tag at the exact point you want the heading to start and another tag where you want the heading to stop. If you would like just one word to be emphasized, you will place a start emphasis tag at the beginning of the word and an end emphasis tag at the end of the word.

HTML Tag Format
All tag formats are the same. They begin with a less-than sign: **<** and end with a greater-than sign: **>**. The text placed inside the < and > is the tag. In order for your HTML tag to format properly, you must know the tag to perform the specific command in which you are trying to accomplish. For example:

Joe

- is the beginning strong (i.e. bold font) tag.
- "Joe" is the word being affected by the tag.
- is the end strong tag. Notice it is exactly the same as the beginning tag except there is a slash in front of the tag command.
- The strong tags above produced: **Joe**

Commonly Used HTML Tags

Please see table below for some of the most commonly used tags.

TASK & HTML TAG	EXAMPLE HTML	OUTCOME
Create a new paragraph The paragraph tag in HTML is and is placed at the beginning of a new paragraph. Use a close tag at the end of the paragraph. **Insert a single line break** The line break tag allows you create a single space between lines. The tag for line breaks does not need a close tag </br> in order to function.	This is an example of when to use the HTML tag for a paragraph versus a line break. For additional information please contact: Example ABC 123 Main Street Atlanta, GA 30329 Thank you for your continued support!	This is an example of when to use the HTML tag for a paragraph versus a line break. For additional information please contact: Example ABC 123 Main Street Atlanta, GA 30329 Thank you for your continued support!
Create bolded text The tag allows you to create bolded text. Use a close tag at the end of the text you wish to bold.	The blue house	The **blue** house

Create italicized text The tag allows you to create italicized text. Use a close tag at the end of the text you wish to italicize.	The blue house	The *blue* house
Create a Hyperlink The <a href> tag is used to create a link to another URL. Use the close tag at the end of the text you wish to be linked.	<p>Visit the Relay For Life home page to find an event in your area.	Visit the Relay For Life home page to find an event in your area.
Create Bulleted List In HTML, bullets are created using the unordered list markup tag, together with the list item tag, . For example, if you want to create a list of reasons for volunteering at the American Cancer Society, you would use the HTML code listed to the right:	 meet new people join in the fight against cancer get involved in your community 	▪ meet new people ▪ join in the fight against cancer ▪ get involved in your community
Create Numbered List If you want to create a numbered list, use the ordered list and the list item tags. Using the same example as above, a numerically ordered list is created by using the following tags:	<ol type ="1"> meet new people join in the fight against cancer get involved in your community 	1. meet new people 2. join in the fight against cancer 3. get involved in your community
Create an Email Link The <a href> tag along with the "mailto:" command is used to create an email link. Use the close tag at the end of the text you wish to be linked.	For more information, contact Sarah.	For more information, contact Sarah.
Link to an Image The <img src> tag is used to link to an image.	<img src="image.gif" alt="some text"> **Image.gif** = file name **alt**= alternate text; this is the text interpreted by accessibility software	(if this were published on the web and you put your mouse over this image, text would appear that reads "some text")

Appendix E: Online Email Campaign Best Practices

Email messaging for Relay For Life is an essential component of Relay Online and for a successful overall event. An email campaign can foster great fundraising and team building plus community collaboration. This email campaign includes:

- Recruitment messages: Recruitment messages are emails sent to past participants or community supports encouraging them to register for Relay For Life
- Engagement messages: Engagement emails are messages directed to registered participants for various purposes like encouraging their efforts, providing tips, and keeping them updated on event happenings.

Data shows that Relay For Life events that send regular recruitment emails and engagement emails to their community is more likely to raise more money, have more participants, and make a greater impact in the fight against cancer than those events that send fewer or less structured messages.

To ensure that relevant and timely emails are being sent to event participants there are four "registration triggered" email communications that will be sent on your behalf. These triggered autoresponders are sent a certain number of days after an individual registers online.

The timeline for the four emails are:

- Email 1: 5 days after registering
- Email 2: 19 days after registering
- Email 3: 27 days after registering
- Email 4: 40 days after registering

These four emails provide general tips and progress for participants to ensure that fundraising and team building messages are being shared throughout the season.

In addition to the four engagement autoresponders, it is important that event managers are sending additional localized Recruitment and Engagement emails. Make sure these emails are sent out on a consistent basis and are customized with encouraging and helpful information for event success! Be consistent and stay on top of your event email messages to ensure everyone is in the loop.

The underlying success of online events always lies with the number of emails that events and participants send out. The more emails sent by engaged Team Captains and Team Participants, the greater the success of your online site! The event level email campaign helps to drive these participant emails and is also a valuable tool to share local Relay For Life messages with your community.

The following information will discuss best practices when composing additional local email messages.

Send emails to the committee, team captains and members throughout the year.

- ***Include a link to the homepage*** so participants can visit the site and check out new information, including documents and photos.
- Use the email campaign as reminders for important dates and activities.
- Use the email campaign to award and recognize great fundraising or other accomplishments.
- When the event is over, update your webpage with a new photo and results. Send a thank you email to all of your supporters, which will include a link to your updated page. Thank those who gave and tell those who didn't give that it is not too late.

Subject Lines

- Keep it Simple! Use 5 words or less. The subject line should not exceed 35 characters.

- Avoid words that prompt recipients to hit the delete key as soon as they read the subject line. Words like "free" and "save," using the Personalization option or ALL CAPITAL LETTERS makes your message looks like “spam.”
- Be concise and have a clear call to action (i.e., Register your team, Join as a survivor, Spread the word, Volunteer, Donate, Sponsor, etc.). Tell them exactly what you want them to do. If you are asking them to register, say that in the Subject Line. If you need them to donate, put that in the subject line. Industry studies indicate that putting a directive in the subject line will raise the return you were looking for.

Body Content

- Keep it short and sweet. Remember people don’t read long and detailed emails. Put those details on your More Event Information or Fundraisers & Activities page, and link to them in your email.
- Limit body copy to 250 words, maximum.
- Use the recipient’s first name. Personalization increases response rates.
- Do not use ALL CAPS. It is considered rude and is the equivalent of “shouting” on the Internet.
- Grab the readers’ attention so they will want to click the link to your Web page.
- Ask one thing at a time and *then let them know what they can do next – this should be part of each email.* For example, there is not always an ask for money but if your event is following the timeline then you may want to add things such as letting them know you are looking for day of event volunteers.
- The tone of the email should be emotional and factual. Tell a clear ACS Story in small chunk. Share a little part of the story each time in the emails.
- Make the Call to Action urgent! Make it personal from a Volunteer Committee member (in the signature line).
- Use the email templates that are already in the Coaching Email section of your Event Management Center. These are great messages that have been created for you with all of the above tips in mind.

Create content based on different audiences.

- Create different email messages for Youth audiences. Work with your youth volunteer to craft the email. They can write a message that will appeal to college or high school students to help get them to respond.
- Develop messages for Survivors. This is your chance to inform survivors of other ACS volunteer activities throughout the year. Inform your survivors of survivorship activities before and during the Relay

Highlight where the money goes!

- Use coaching emails to communicate the research and patient programs and services offered by the American Cancer Society.
- The Publicity Chair and/or Online Promotional Chair can use data and information in combination with local stories that highlights how the dollars raised by the event are making a difference in their community

Proofreading

- Check spelling and grammar. You want your message to appear thoughtful and reasoned.
- Always, always, always preview your message.
- Send a review email to your event chair, staff partner, English teacher, copy writer, newspaper editor, friend, or loved one. Another pair of eyes is critical.
- Remember, you can’t take back an email once it’s sent. Be sure the links work and there are no errors in dates or typos.

Scheduling

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

Update your websites.

- Personalize the event web pages so it reflects your event's personality and theme.
- Be mindful of addressing the different needs, concerns, interests in race, ethnicity, gender, age, physical ability, communication styles, sexual orientation, economic status, education, religion, and culture.
- Change the message of your emails and personalize your site to match the content of the emails.

Sending Emails from the EMC

When doing a Relay For Life email blast (whether it is event wide, or to a small audience like Committee Members), you should ALWAYS use the email tool in the EMC. Never send RFL e-blasts through your Personal Email.

- Sending e-blasts through your Personal Email (Google, Yahoo, Lotus Notes, etc.) will actually increase our Spam rating as an organization.
- Our web provider has very low Spam rating, so it will actually improve the likelihood of delivery if you send emails through the EMC.
- When you send an email from your Personal Email, you cannot filter out participants who may have unsubscribed from e-communication
- Emails sent through your Personal Email do not have an unsubscribe link in them, which prevents users from managing their own email preferences. Every email in the EMC has an unsubscribe link!

Tips for Reducing Email Spam Risk

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

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

Appendix F: Coaching Email Quick Tips

Tips for Customizing and Sending/Scheduling
Your Engagement & Recruitment Emails

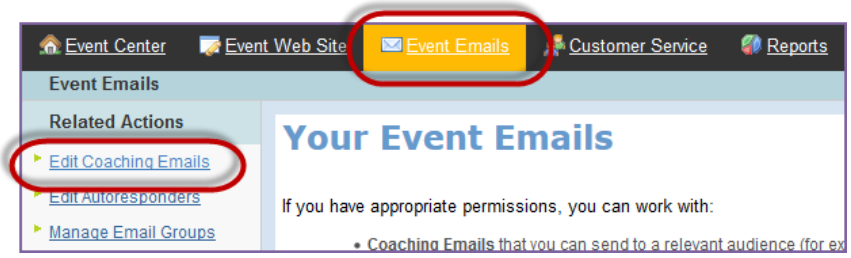
Start by logging into the EMC.

1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at relayforlife.org.

2. Enter your **Username** and **Password** in the login fields on the top right side of the page, then click the **Event Manager** link that appears next to your name.

3. From the Event Management Center, click **Event Emails** in the top Navigation Bar.

4. Under Related Actions, select **Edit Coaching Emails**.



5. The complete list of available email templates will display in the Coaching Email Center.

Tips for Customizing Your Email

Select the email you want to send, and "Copy" it to make it editable. Then click "Edit" next to the new version of your email template. Follow the steps. Here are some tips to keep in mind as you go through the customization….

1. **Message Information:** Each email has a specific naming convention. W*hen you are copying/editing a message to send, please do not delete or change the message name. The message names were strategically crafted to allow us to more accurately report on the success of the eCommunication campaign this year.*

2. **Envelope Information:** Must be customized for each email, regardless of email type. The required customization is:
   - Sender Name: Must be updated with Relay For Life event name
   - Sender Email: Must be updated with ACS staff person's cancer.org email

3. **Stationary:** Select the stationary that best suits your email message.

4. **HTML Content:** Update the body of your email to include your desired information.

5. **Plain Text Content:** Always click the green Convert to Plain Text button. *Always remember to update the Plain Text any time you update the HTML, so the plain text version will include your new/updated content.*

6. **Send Review Email:** Always complete this step and send your review email in both the HTML and Plain Text version to ensure that the emails can be received and viewed properly and verify that the content and links are all correct. *Make updates to your content as necessary.*

7. **Approve!** ☺

Tips for Setting Up Email Audience

Once you have "Approved" your email, click "Begin Delivery" to walk through the process to send it. Follow the steps. Here are some tips to keep in mind as you go through the process of setting up your email audience.

1. **Email Audience:** Select the correct audience based on the email type.
   - Recruitment Email: Should go to past participants, inviting them back to Relay *(go to step 2)*
   - Engagement Email: Should go to current participants, sharing event information and tips on being a successful Relayer *(skip to step 3)*

2. Setting up **Past Participant** audience for a **Recruitment Email**:
   a. Select the "Previous Event Participants" radio button
   b. In step two, highlight any groups you wish to email and "Add >>" them so they appear in Your Selections list. Or you can click "Add All >>" to email all past participant groups.

   ***Since the message in your Recruitment emails is asking your past teams and participants to register, you will need to set your current event participants as a Do Not Mail group so individuals already registered online will not receive another email asking them to register. So…*

   c. In step three, on the summary page, click the link to **Manage Do Not Email Groups** under Related Actions on the left. Choose the radio button for "Current Event Participants". Click Next.
   d. Select Do Not Email Groups: Click "Exclude All >>" This will ensure that everyone already registered for your event will not receive an email asking them to register again.
   e. Proceed to Review Delivery Details to set up your email delivery

3. Setting up **Current Participant** audience for an **Engagement Email**:
   a. Select the "Current Event Participants" radio button
   b. In step two, highlight any groups you wish to email and "Add >>" them so they appear in Your Selections list. Or you can click "Add All >>" to email all current event participant groups.

   ***There are no "Do Not Mail" groups for Engagement Emails. So…*

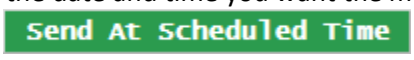
   c. Proceed to Review Delivery Details to set up your email delivery

Tips for Email Delivery (Review Delivery Details)

Once your email audience has been configured, you can complete the email delivery process. Follow the steps on the Delivery Details screen.

1. If you wish to send your message immediately, click the

button at the bottom of the summary page.

2. To schedule the delivery for a later time click on **Schedule** under Related Actions on the left side of the Review page. Select the date and time you want the message to send and click Finish. Verify that your delivery time is correct and click 

at the bottom of the page.

Appendix G: Offline Sponsorship Guide

NOTE: You are ready to track sponsor through the website and EMT when you have a sponsor commitment form and the donation associated with that commitment in hand. Whether it is credited to the participant, team, company or event, the donation must be in line with the sponsor levels available for that event. In other words, a donation that doesn't meet the minimum sponsor level should not be processed as a sponsor donation (even if was submitted with a sponsor commitment form).

Creating the Sponsor as a Local Company on your website *(Optional)*

If you wish for teams / participants to be able to select the sponsor company during registration, you will want to complete this process first to add the sponsor as a Local Company. If you do not wish to add the sponsor as a Local Company, you can skip to the next step.

Once the sponsoring company has been added to the website, anyone who registers as a team under that company will be able to select the business name from the 'Company' dropdown during the Team registration process. Sponsorship gifts credited to a Participant or Team will roll up into the Local Company totals if they are registered under that company. All gifts will roll up into event totals.

For complete steps to add a Local Company, see Chapter 8: Customer Service - Manage Companies

Enter Sponsorship Income into your Relay Online Website and EMT

This document includes information on how to enter your event sponsorships on your Event Website through the EMC and in EMT. These procedures will help with the ability to report on and tracking of sponsorship money on the scorecards and other reports for the events. It will also allow you to be able to get lists of sponsors from EMT.

DOWNLOAD SPONSOR GUIDE

Appendix H: Event Management Center Report Guide

Please use this document as a guide for reports that are available in the RFL & BFL EMC. As always ACS Privacy Guidelines should be followed when handling information on ACS constituents and the information provided within the reports should not be shared.

The available reports within EMC may change as the year progresses and if at any time you need assistance or have a question on the reports, please open a ticket at http://helpme.cancer.org.

Please note there may be times when information added to the websites is not reflected within the reports as expected. If you notice information is still missing 72 hours after it has been entered, please open a help ticket.

NOTE: If at any time you need website performance information that is NOT provided with in the available EMC reports, please complete a report request form using this link and the E-Revenue team will assist with getting the information you need.

01 Event Snap Shot

- Purpose: An event performance report containing online income and registration numbers, a quick update that can be pulled at any time, without waiting for weekly field management reports to be provided.
- Definition: An event snapshot with overall event totals for online and offline gifts, online fees, teams and participants. This is an event performance report for event managers. This report is commonly used to identify the categories of the income that are listed on the website totals. The total $ that is listed on the website for RFL events is all online gifts, offline non-rejected gifts and online fees. There is NOT a date range attached to this report. The report will pull all information related to the event regardless of when the "activity" took place.
- Data provided within this report should be close to real time taking only minutes after a donation is made to reflect within the report.
- Report contains the following fields:
    - Internal Convio event name
    - # of teams
    - # of active participants
    - Total online $
    - Total offline not rejected $ (Offline confirmed and unconfirmed)
    - Online fees
    - Total of not rejected gifts (this will not include online fees)
    - # of Emails sent

02 Team Summary with Date Range

- Purpose: A listing of team's performance within a date range. This report should be used to measure online team challenges and to monitor top teams. The report will only list teams that have had activity within the dates provided. If a team has not had any activity within the date range entered the team will NOT be listed on the report.
- Definition: A list of teams with activity within the date range provided. Will include contact information for the team captain as it is listed in Convio WITHOUT suppressions. The $ listed is the $ that were raised during the time frame entered. *Active registration count is the # of people on the team that were active during the dates entered, not the number of people that registered during the time frame entered.*

- Data provided within this report is not real time and information can take about an hour to be available within this report.
- Filters: Calendar Date. For a complete team snapshot use a beginning date of 9/1/2014
- Report contains the following fields:
    - Total Online Gifts ($)
    - Total offline not-rejected gifts ($)
    - Total TAF Emails (Emails sent from Participants)
    - Active Registration Count
    - Online Fee Amount ($)
    - Internal Event Name
    - Public Company Name
    - Team Creation Date
    - Team Name
    - Team Captain (TC) Accepts Email
    - TC Primary Email Address
    - TC First Name
    - TC Last Name
    - TC Home Phone
    - TC Home Address
    - Team ID #
    - TC Constituent ID #

03 Participant Report

- Purpose: To provide a listing of participants for the events with fundraising and personal information.
- Description: A report that will pull all participants for the event that will list T-shirt size, if they are a team captain, a cancer survivor, fundraising details and contact information. Please note that this report does contain sensitive information and handling of this report should follow ACS Privacy Guidelines and not be shared with anyone that is not ACS staff for the event.
- Data provided within this report should be close to real time taking only minutes after a something has been added to the website to reflect within the report.
- Report contains the following fields:
    - Internal Company Name (Company Name)
    - Discount Code
    - Total offline not-rejected ($)
    - Total online gifts ($)
    - Total of all not-rejected gifts ($)
    - Participant Cancer Survivor
    - Participant Name
    - Participant Address (Home)
    - Participant DOB
    - Participant Accept Email
    - Participant Email
    - Participant Phone
    - Participant Type Name
    - Is team Captain
    - Registration Date
    - Emails Sent
    - Team Name
    - Internal Event Name (Event Name)
    - Participant T-Shirt size
    - Online Fees Paid Amount ($)

04 Participant Emails sent (Date Range Report)

- Purpose: Report can be used for Online Challenges to determine what participant sent out the most emails within the date range provided.
- Description: Provide a list of participants with Team information on the number of emails that have been sent within the date range added to the report. Please note that this report will not report back all participants registered for the event, only ones that had some type of activity within Blackbaud during the dates provided. Because of this you may have participants that are included in the report that have not had any emails sent, this is expected and not a glitch with the report.

- Data provided within this report is not real time and information can take about an hour to be available within this report.
- Filters: Calendar Date
- Report contains the following fields:
    - Event Name
    - Team
    - First Name
    - Last Name
    - Team Captain
    - # of Participant emails sent
    - Primary Email Address
    - Accepts Email

05 Participant Fundraising (Date Range Report)

- Purpose: Provide a list of participants with $ raised within time period entered. This report can be used for online fundraising challenges.
- Description: Provides a list of participants with team information and $ raised within the time frame entered for the report. Please note: This report will only pull participants that have had some type of activity within the date range used. Activity can include but not limited to an email being sent from the participant center, $$ raised and registration. Report will not pull participants that did not have any activity within the time frame used.
- Data provided within this report is not real time and information can take about an hour to be available within this report.
- Filters: Calendar Date
- Report contains the following fields:
    - Event Name
    - Team Name
    - Frist Name
    - Last Name
    - Online Gifts ($)
    - Street 1
    - Street 2
    - City
    - State
    - Zip
    - Accept Email?
    - Email
    - Phone
    - Total of Offline not-Rejected Gifts ($)
    - Total of All not-Rejected Gifts ($)

06 Donation Report

- Purpose: To provide a list of all donations to the event.
- Description: Report should be used by event managers only and not shared with NON ACS staff as this report contains sensitive donor information. This report can be used to pull all donations to an event when looking for details on $ raised for the event by teams and participants. If more details are needed for the donors to an event, please submit a report request through the portal in EMT with the business reason more details are needed for donor information.
- Data provided within this report should be close to real time taking only minutes after a donation is made to reflect within the report.
- Report contains the following fields:
    - Event Name
    - Soft Credit Type
    - Team Name
    - Participant Last Name
    - Participant First Name
    - Gift Date
    - Gift Type
    - Is Facebook Donation
    - Donor Last Name
    - Donor Email

- Offline Status
- Is registration?
- Online fees Paid ($)
- Offline fess Paid($)
- Transaction Date
- Transaction ID
- User confirmation code

07 Luminaria Report

- Purpose: Provide a list of all luminaria sales with donor detail
- Description: eCommerce report that provides a list of all luninaria sales with details. This report does contain sensitive information on our donors and sharing of this information should follow ACS privacy guidelines.
- Data provided within this report should be close to real time taking only minutes after a donation is made to reflect within the report.
- Report contains the following fields:
  - Event Name
  - Team Name
  - Team/ Participant/Event Credited
  - Donation Date
  - Order part type
  - Order part amount
  - Donor First Name
  - Donor Last Name
  - Donor Street 1
  - Donor Street 2
  - Donor City
  - Donor State
  - Donor Zip
  - Donor Phone
  - Donor Email
  - Donor Accept Email
  - Luminaria Purchase Amount ($)
  - Tribute Type
  - Tribute First Name
  - Tribute Last Name

08 Participant - 1k report

- Purpose: Provide a participant list of those that have raised $1000 or more
- Description: A report that will pull all participants for the event that will list T-shirt size, if they are a team captain, a cancer survivor, fundraising details and contact information. Please note that this report does contain sensitive information and handling of this report should follow ACS Privacy Guidelines and not be shared with anyone that is not ACS staff for the event.
- Data provided within this report should be close to real time taking only minutes after a donation has been added to the website to reflect within the report.
- Filters: Total of all Not Rejected Gifts is greater than or equal to $1000
- Report contains the following fields:
  - Internal Company Name
  - Discount Code
  - Total offline not-rejected ($)
  - Total online gifts ($)
  - Total of all not-rejected gifts ($)
  - Participant Cancer Survivor
  - Participant Name
  - Participant Address (Home)
  - Participant DOB
  - Participant Accept Email
  - Participant Email
  - Participant Phone
  - Participant Type Name
  - Is team Captain
  - Registration Date
  - Emails Sent
  - Team Name
  - Internal Event Name (Event Name)
  - Participant T-Shirt size
  - Online Fees Paid Amount ($)

09 Coaching Email Performance

- Purpose: Provide results on coaching emails that are sent to the participants of the event.
- Description: High level report to see if participants are responding to coaching emails that are being sent.
- Data provided within this report should be close to real time taking only minutes after an Email has been sent to reflect within the report.
- Filters: Email Started Date is not Blank
- Report contains the following fields:
    - Internal Event Name
    - Event Date
    - Email Campaign Name
    - Message Name
    - Targeted Email Delivery Count
    - Send Started Date
    - Send Ended Date
    - Emails Sent: # of email addresses the message was sent
    - Emails Delivered: : # of messages that reached their intended email address and didn't bounce back
    - Opens: # of delivered coaching emails that were opened/viewed
    - Click-Throughs: of recipients who click on links within the body of your email
    - Actions Taken
    - Total Open Count: # of recipients who open (view) your message including messages that were forwarded.
    - Total Click-Throughs: # of recipients who click on links within the body of your email including messages that were forwarded.

OLER Reports:

OLER Donation Report

- Purpose: Provide a list of offline gifts for the OLER process.
- Data provided within this report should be close to real time taking only minutes after a donation is made to reflect within the report.
- Filters: Gift Type is offline
- Report contains the following fields:
    - Event Name
    - Batch ID
    - Soft Credit Type
    - Transaction Date
    - Transaction Amount
    - Donor first name
    - Donor last name
    - Donor Recognition name
    - Gift Type
    - Transaction Type
    - Gift Payment Method
    - Participants Team Name
    - Participant First Name
    - Participant Last Name
    - Participant Email
    - User Confirmation Code

Batch Upload Reports

The following OLER reports are to be used to populate the upload tool (Excel) for processing offline donations in Convio. For more information please refer to the OLER training available in Society Pathways.

- OLER upload Participant Report
- OLER upload Team Report
- OLER upload Event Report

Appendix I: Frequently Asked Questions about the Relay Online Tool

Event Center

The date/location/staff of our Relay has changed, how can I update it on the website?
As you are completing the customization process, if you find that any event details are incorrect, you will need to follow the formal process to submit the changes so they can be made in all databases. We have a new nationally centralized process for submitting various types of event requests, which allows us to update all databases as appropriate. The new process for submitting these types of requests can be accessed through EMT.

1. Log into EMT
2. Scroll down to the 'Resources' section
3. Click the Update an existing event link
4. This link will take you to the Event Change Request Form
5. Complete and submit this form. Please fill out all required fields, and be very specific about the change(s) you are requesting.

See Appendix B for more information on submitting different event change requests.

My American Cancer Society office has changed. How to I update the information for the Offline Donation Forms?
As you are completing the customization process, if you find that any event details are incorrect, you will need to follow the formal process to submit the changes so they can be made in all databases. We have a new nationally centralized process for submitting various types of event requests, which allows us to update all databases as appropriate. The new process for submitting these types of requests can be accessed through EMT.

1. Log into EMT
2. Scroll down to the 'Resources' section
3. Click the Update an existing event link
4. This link will take you to the Event Change Request Form
5. Complete and submit this form. Please fill out all required fields, and be very specific about the change(s) you are requesting.

See Appendix B for more information on submitting different event change requests.

How do I update the announcement lines on the Event tab of the Relay Dashboard?
Keeping your Event tab of the Relay Dashboard up to date is important and easy within the announcement lines.

1. From the Event Manager Center, select Event Center from the top Navigation Bar
2. Under Related Actions (left hand side), choose Edit Event Properties
3. Enter a short announcement into the **Sponsor Name 1** field.
   *** Keep these announcement line short (approximately 160 characters) to ensure they display properly on all internet browsers.*
4. Click **Save**

How do I upload a document to the Event Library?

1. Log into your Event Management Center
2. Click Event Center from the top Navigation Bar
3. Under Related Actions (left hand side), choose Manage Event Library
4. Under the Documents List tab on the second level navigation, click Upload New Document
5. Click Browse to find the document on your computer and click Open
6. Click Upload and Next once your file shows
7. To identify your document specify the following:
   a. Document Title: Identifies the document file in the Event Library. This name will show up in the dropdown menu when you add it in the web page/email editor (WYSIWYG)

b. Description: Describe the purpose and content of the document file
c. Keywords: Helps locate document when searching, use words that will make it easy to find document in the future if you cannot remember the name

8. Click **Finish**
   *** Once the document is in your library, you can a link to the document on a web page and in an email.*

How do I add an image to the Event Library?

1. Log into your Event Management Center
2. Click Event Center from the top Navigation Bar
3. Under Related Actions (left hand side), choose Manage Event Library
4. Under the Image List tab on the second level navigation, click Upload New Image
5. Identify your image specify the following:
   a. Image Title: Identifies the file and will be the name that displays in the list tab
   b. Alternate Text: Helps identify the content or purpose of the image (used in HTML img src tag). This is primarily used for screen readers
6. Click Browse to located the image on your computer and click Open
7. Click Upload. Once your image has completed uploading it will show up at the bottom of the page.
8. Click Finish
   *** Once the image is in your library, you can add the image to a web page or email by clicking the WYSIWYG tree icon; all the images in your image library will be available in the drop down menu to choose from.*

How do I resize the file size of a photo?

Here is an easy web-based photo resizer you can use to get your pictures down to the right size:
http://www.picresize.com/

Event Website

How do I link to a document on a webpage?

Before you link a document onto a Web page, upload the document to the Event Manager Center document library (see instructions above).

1. Log into the Event Management Center
2. Click Event Website from the top Navigation Bar
3. From the drop down menu, choose the page you'd like to edit and include the document link within
4. In the upper right hand corner of the page's editable field, find and click the blue Edit button
5. Once you open that page for editing, type and highlight with your cursor the text you'd like to be a link
6. Choose the add link button in the WYSIWYG editor
7. From the link drop down menu, all the way at the bottom of that list, you'll find all the documents you have uploaded in your document library
8. Select the document you'd like and insert. Once you save that page, it will become a link to the document

How do I add a page I just created to the website?

If you have created or copied a custom page that you would like included in your Relay website, you must create a link for that page in the Navigation Bar displayed in the My Dashboard tab of the Relay Dashboard. Note that only 10 links are allowed in the Navigation Bar.

1. Log into the Event Management Center
2. Click Event Website from the top Navigation Bar
3. Click Configure Navigation Bar

4. Under Add Page to Navigation Menu follow the steps to select and name the page you would like to add to a particular section of the Navigation Bar
5. When done click Save and Finish

How do I delete a page? How do I remove a link from the right hand Navigation Bar?
You can never fully delete a page's content; however, you can remove it as a link from the Navigation Bar displayed in the My Dashboard tab of the Relay Dashboard. Note that only 10 links are allowed in the Navigation Bar:

1. Log into you Event Management Center
2. Click Event Web Site from the top Navigation Bar
3. Click Configure Navigation Bar
4. Under Add Page to Navigation Menu find the link you wish to remove and then click the trash can icon which will bring up a confirmation window.
5. Click OK and the link will be removed. (If you want to add this page back at any time, you can find it in the list of pages on the right hand side.)
6. When done click Save and Finish

Event Emails

How can I remove email addresses from groups in my event?

1. Log into your Event Management Center, and click Event Emails from the top Navigation Bar
2. Under related actions, select Manage Email Groups
3. Select the group the participant you wish to remove is a member of, and click manage next to the group name
4. Find the participant in the group and select remove under the actions column next to his/her name
5. You might have to search multiple groups if that participant was involved for multiple years or in different ways

Customer Service

A donation was accidentally credited to the wrong team/participant/level, how can I change that?

1. Log in to your Event Manager Center, and click Customer Service from the top Navigation Bar
2. Under Related Actions (left hand side), click Manage Teams (if the donation is at the team level and needs to be moved), or click Manage Participants (if the donation is at the participant level and needs to be moved). If you are unsure where the donation is currently credited, first search donations to find the information you are looking for.
3. Find your team/participant in the list provided or through the search feature.
4. Once you've found your team/participant, click Manage.
5. Scroll to the bottom of the page and you'll see the Gift History section.
6. To move the credit of a donation, click Change Soft Credit beside the gift record:
    a. Step 1 Select Type: Select the New Soft Credit Recipient. Choose who should receive the soft credit for this gift; select whether you'd like to credit this gift to another TeamRaiser Participant or TeamRaiser Team by clicking the appropriate radio button. Then select Search For Recipient. Search the corresponding list. Click Search to find the participant or team.
    b. Step 2 Search Criteria: enter at least one search term and click Next
    c. Step 3 Select Destinations: Find in the entity you would like the donation credited to in your search results. Click Select next to the person or team to whom you are reassigning credit for the donation.
    d. Step 4 Confirm Changes: Review the information of the change before confirming. If it is incorrect, click on any of the previous steps in the Process Navigator on the left side of the page to make the necessary changes.
7. If it is correct, click Finish.

How do I delete a team member?

1. Log into your Event Management Center
2. Click Customer Service from the top Navigation Bar
3. Under Related Actions (left hand side), click Manage Participants
4. Find your participant's record you would like to delete in the list or through the search feature
5. Once you've found your participant, click Manage Participant beside his/her name
6. Under Related Actions (left hand side) and click Remove from all teams
7. Under Related Actions (left hand side), select Inactive. Follow steps to make the account inactive.
8. Once a participant in inactive, you will find the Delete Registration link under Related Actions. Click Delete Registration to remove the participant entirely from the site.

How do I delete a team?

Before deleting a team from the website, you will have to delete all the members on that team:

1. Log into your Event Management Center
2. Click Customer Service from the top Navigation Bar
3. Under Related Actions (left hand side), click Manage Teams
4. In the list provided or through the search function, find the team you would like to delete
5. Click Manage beside the team account
6. Select the members tab
7. Remove each participant by selecting manage next to their name and
    a. Remove from all teams
    b. Make inactive
    c. Delete registration under related actions on the left.
8. This will remove the participants from the entire event site. Once you have removed all participants, and finally the team captain, the team will no longer exist.

Reports

I ran a report, where is it?

The more data you have to collect in a report, the longer the report will take to generate. Try clicking the refresh button every few minutes and make sure you are in the Reports Results tab

Appendix J: Highlighting Online Fundraising at Meetings

Check it out! Below is a great resource that you and your Online Chairs can use as a monthly guide for focus topics and activities to highlight Online Fundraising at team captain meetings.

Make sure Online Fundraising has a spot on each meeting agenda – and encourage your Team Captains to get their teams online!

Month	Team captain meeting activity/focus
September	• Offer a demonstration during the first team captain meeting to show the registration process and to highlight any changes from the previous year.
October	• Recognize each team that is registered on-line to date during a team meeting! • Show the team captains how EASY it is to submit their fundraiser and photos on-line.
November	• Demonstrate how a team and team member can update their websites to tell their own story and upload their own photos.
December	• Social Media! Show how easy it is to link a Facebook/Twitter account with a team or individual page.
January	• Remind team captains to encourage their team members to register on-line. Go over how to send an email from the participant website. • Introduce on-line challenge: Team or team member who sends the most emails from now until the next team captain meeting will win a Relay prize! (See your staff partner for a give-away!)
February	• Review on-line registration process to capture any new Relay teams.
March	• Highlight a video from rfl.org and show where team captains can find support resources on-line (i.e. Under "Get Involved", the Relay How-to and Talk Relay are great resources!)
April	• Show team captains the "More Event Info" page. Explain this is where they can download a Youth Waiver Form, view the entertainment schedule for Relay once it's available, and find other important event-specific information.
May	• Explain how participants can send a beautiful eCard from their website to thank donors.
June	• Show team captains how they can search on rfl.org for fundraising ideas from around the country! The blogs and open forums are a great resource- volunteer to volunteer!
July	• Send a post-event email to all participants- congratulate them on their success. • Introduce on-line challenge: Encourage participants to take a photo of them wearing their RFL shirts on vacation, doing yard work, hanging with family and friends, etc. Have them post their pic to their website! Let the creativity flow! We can turn this into a fundraising opportunity as well - have people donate to "vote" for their favorite summertime photo!
August	• Encourage team captains to make one more on-line fundraising push and send those emails!