

# Relay Online How To: Online Participant Guide

# RELAY FOR LIFE ONLINE PARTICIPANT GUIDE

# Welcome to the American Cancer Society's Online Participant Guide.

This Guide includes everything a participant needs to successfully sign up, work within their dashboard, and enhance their fundraising experience.

Let's dive in! <sup>◎</sup>

Last Updated: February 2016

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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 -

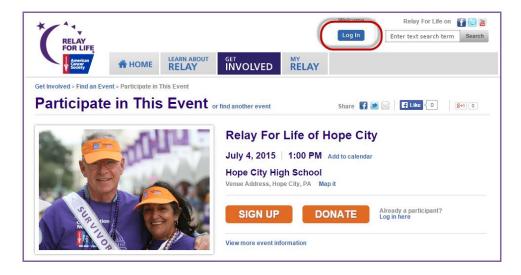
- Now you can login using your preferred social account login credentials or with your email address
- You will be recognized on all of our event sites, so there will be no need for multiple user names and passwords
- Enhanced account security across all Society applications

## **Creating a New Account**

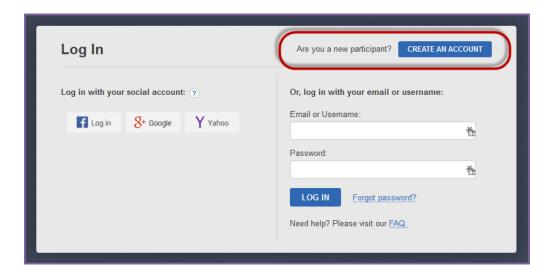
(For first-time American Cancer Society online event participants)

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!

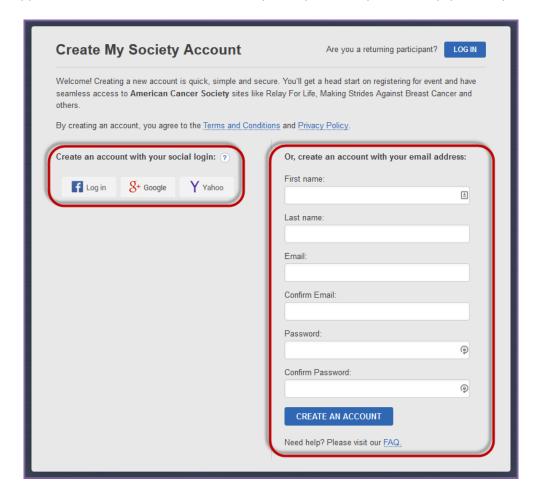
- 1. From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event website will appear. If you do not know your event's friendly URL, you can search for your Relay at <u>relayforlife.org</u>.
- 2. Click on the **Log In** link in the upper right-hand corner.



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.

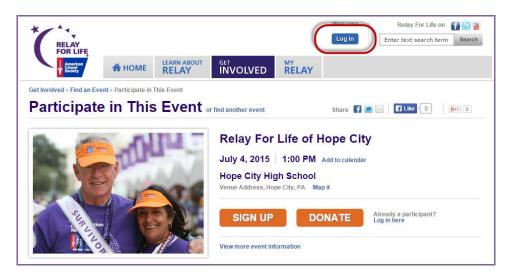
# **Logging in to Your Existing Society Account**

#### (For returning American Cancer Society online event participants)

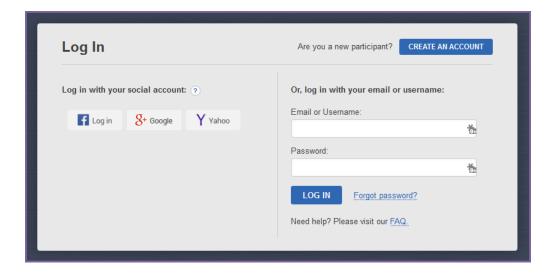
If you have previously participated in an American Cancer Society event online (this includes Relay For Life, Making Strides Against Breast Cancer, Bark For Life, DetermiNation, etc.) you can login using the most recent email address with which you registered.

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.

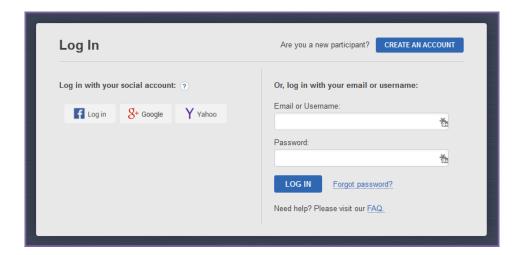
As a team captain, you may begin your team building and fundraising as soon as you set up your team's webpage. Team captains serve as role models for online fundraising and help build excitement for the event. Please use these step-by-step instructions to register your team online.

#### Good luck and have fun!

- 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 <u>relayforlife.org</u>.
- 2. Click on the **Sign Up** link.



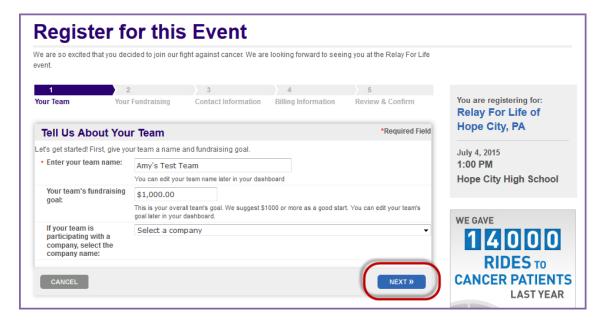
- 3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)
  - a. **Note:** If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with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



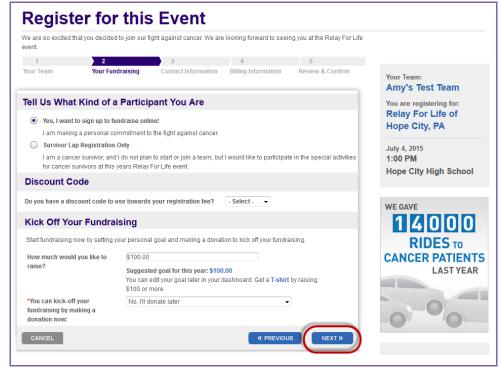
4. Once you have logged into the website, click the **Start a Team** button.

# START A TEAM

- 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



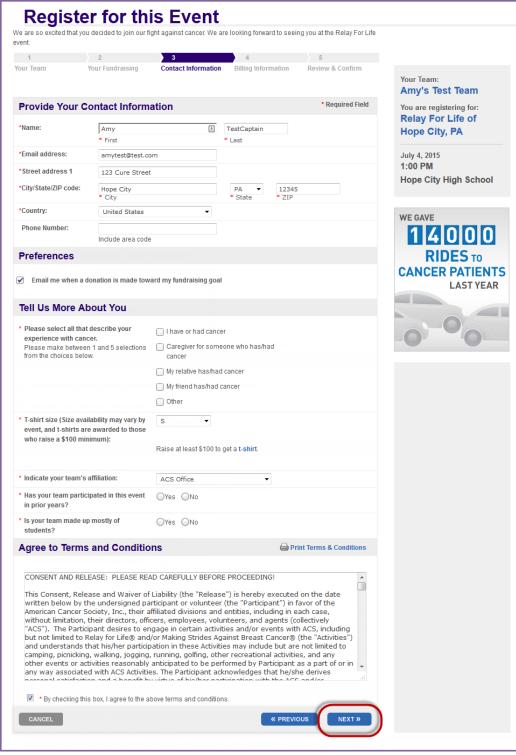
- Select the participation option that best fits your involvement in Relay For Life by clicking the radio button beside the participation type name and description.
- 7. If you have a discount code to apply to your registration fee, select YES from the drop down menu beside the question "Do you have a discount code to use towards your registration fee?" Enter the code in the field that appears.
- 8. Personalize your individual **Fundraising Goal**.
- 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.

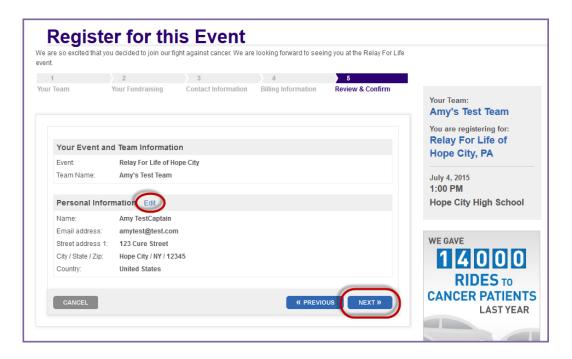
- 10. Click Next.
- 11. Complete the **Registration Form** with your personal information. Remember the \* symbol means the field is required.



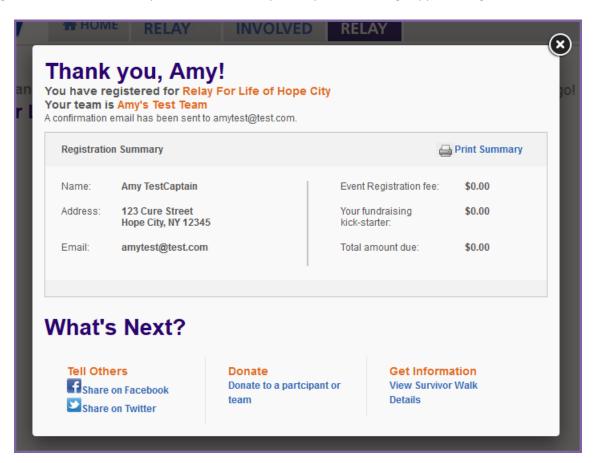
If you are a returning participant, this information should be completed for you, making the registration process easier. Please be sure to check that all fields are updated for the current year.

- 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.

- 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

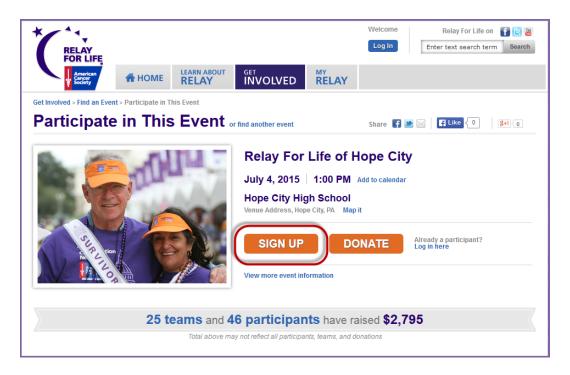
Thank you for being a Relay For Life team member. Please use these step-by-step instructions to join your team online.

By signing up online, you have access to a number of tools, such as a personal webpage to share your story, a message

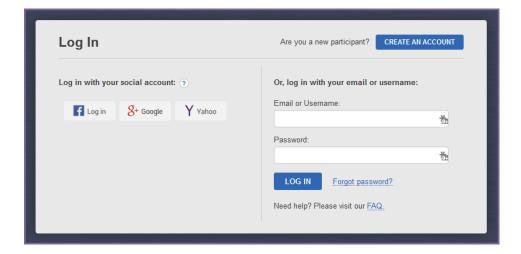
center to send out emails to your friends and family asking for their support, and an easy way to track your progress.

#### 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.
- 2. Click on the Sign Up link.



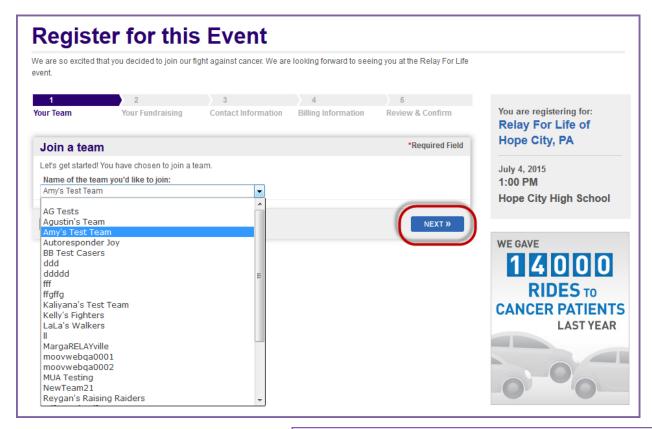
- 3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)
  - a. **Note:** If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with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



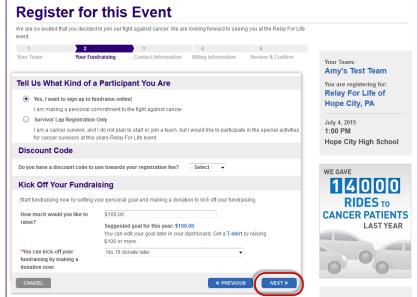
4. Once you have logged into the website, click the **Join a Team** button.

JOIN A TEAM

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**.

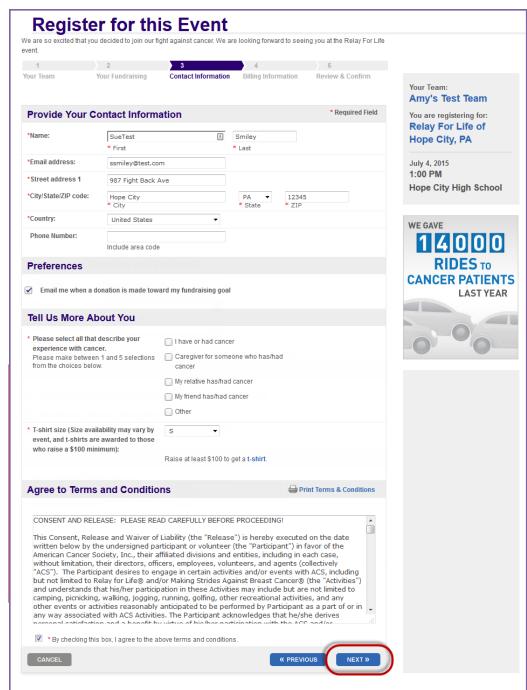


- 6. Select the **participation option** that best fits your involvement in Relay For Life by clicking the radio button beside the participation type name and description.
- 7. If you have a discount code to apply to your registration fee, select **YES** from the drop down menu beside the question "**Do you have a discount code to use towards your registration fee?**" Enter the code in the field that appears.
- 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**.

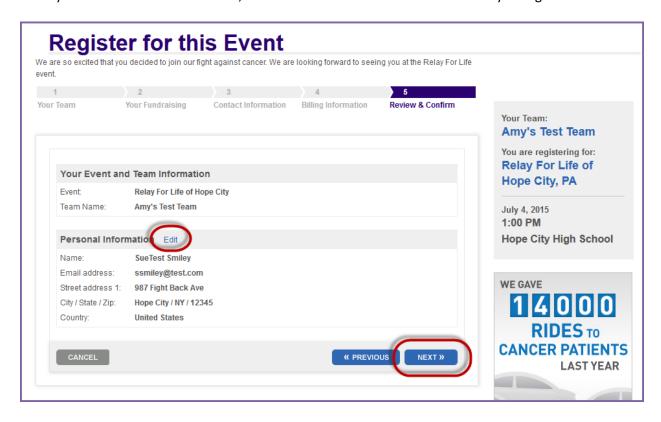
- a. If you choose to start off your fundraising by making a donation during your registration, determine if you would like to make the gift anonymous by checking the appropriate box.
- 10. Click Next.
- 11. Complete the **Registration Form** with your personal information. Remember the \* symbol means the field is required.



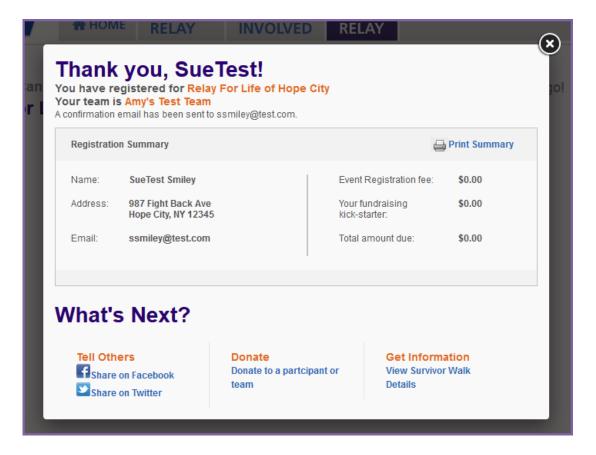
If you are a returning participant, this information should be completed for you, making the registration process easier. Please be sure to check that all fields are updated for the current year.

- a. **Contact information**
- b. Email preferences
- c. Answer the **additional** registration questions regarding your relationship with cancer and t-shirt size.
- 12. Read the Waiver and click the box beside "I agree to the terms and conditions" before clicking Next.

- 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.



# 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.

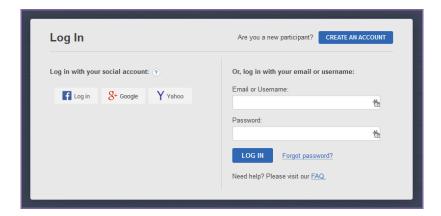
Please use the following instructions to help you register online for your Relay event's **survivor lap only**. *If you are a team captain or team member, please use the instructions to start or join a team to guide your online registration.* 

#### Good luck and have fun!

- 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 <u>relayforlife.org</u>.
- 2. Click on the Sign Up link.



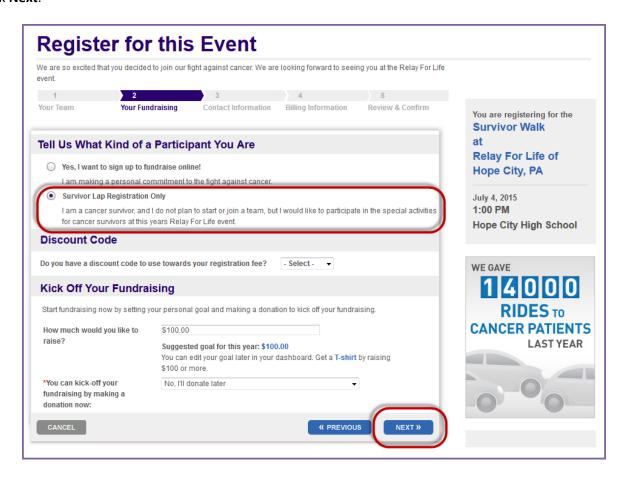
- 3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)
  - a. **Note:** If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with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



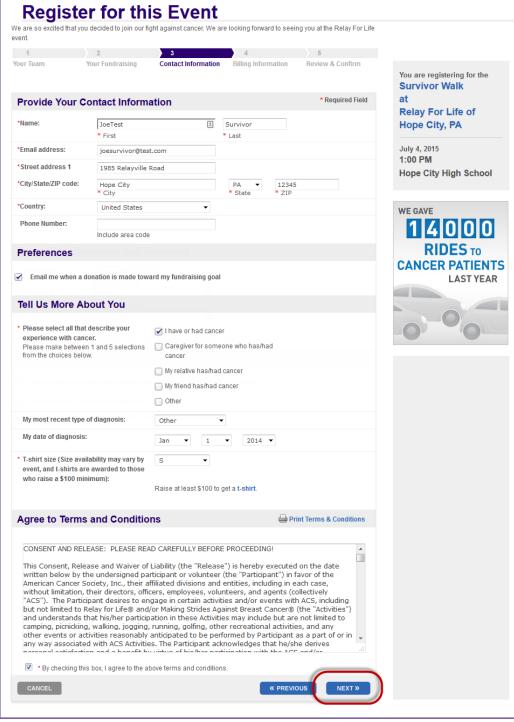
- 4. Once you have logged into the website, click the **Walk the Survivor Lap** button.
- 5. If you did not previously register online for Relay For Life, click the Walk the Survivor Lap button.

WALK THE SURVIVOR LAP

- 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**.
  - 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.
- 9. Click Next.



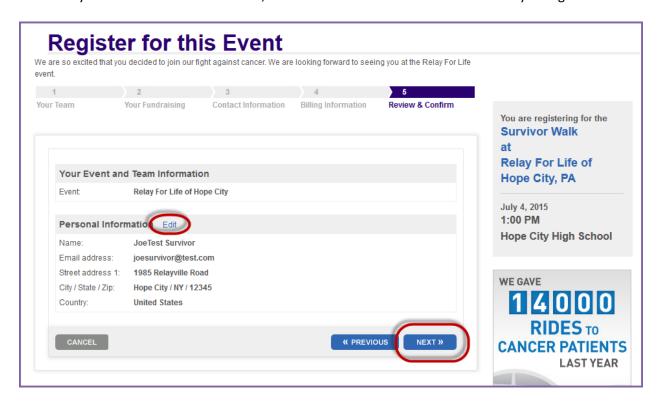
10. Complete the **Registration Form** with your personal information. Remember the \* symbol means the field is required.



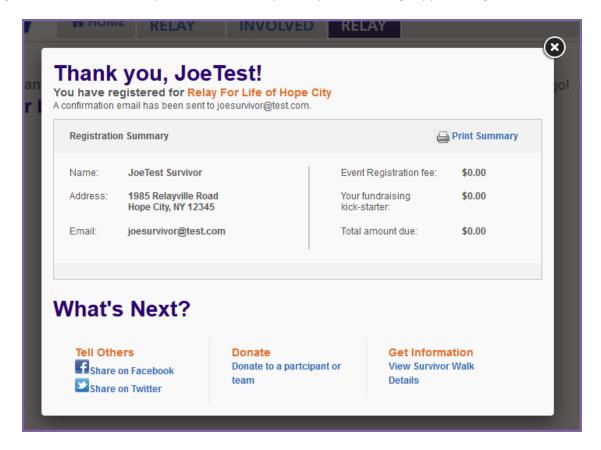
If you are a returning participant, this information should be completed for you, making the registration process easier. Please be sure to check that all fields are updated for the current year.

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

- 12. 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.



13. **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.





# **Chapter 2: Online Fundraising Tools - Your Relay Dashboard**

- Access Your Relay Dashboard
- Dashboard Overview
  - o My Relay Tab
  - o 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

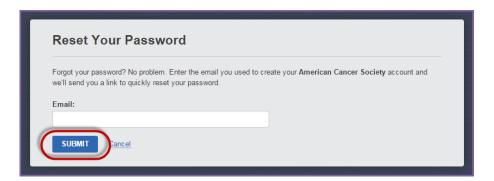
event progress.

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!

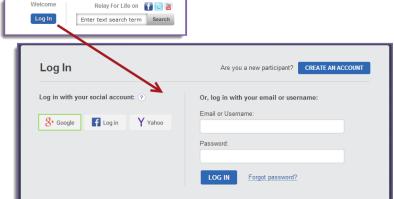
# **Access Your Relay Dashboard**

- 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!

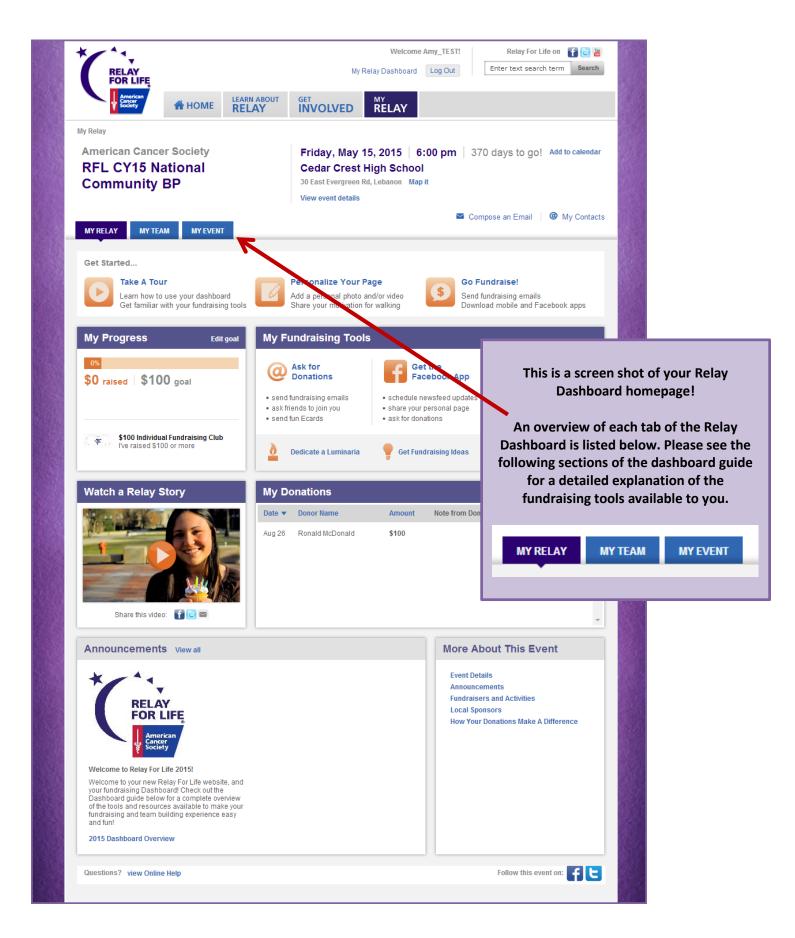


**Note:** If this is your first time logging in since November 2014, you may also need to migrate your participation record to the new Society Account. Lean more about the new Society Account in <u>Chapter 1</u>.

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

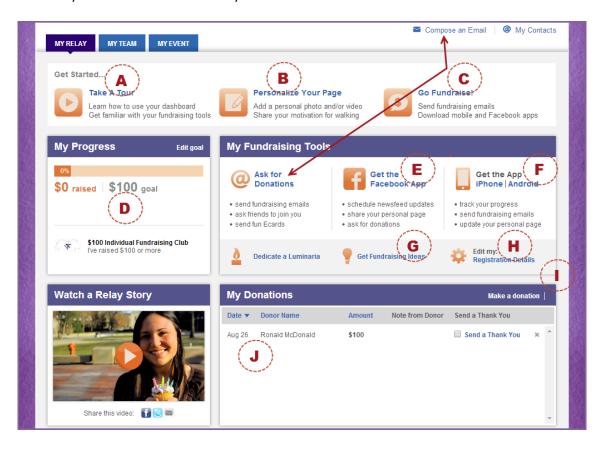


**CONGRATULATIONS!** You are now logged in to Your Relay Dashboard.

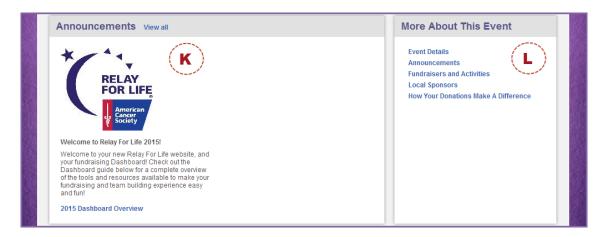


#### **Dashboard Overview**

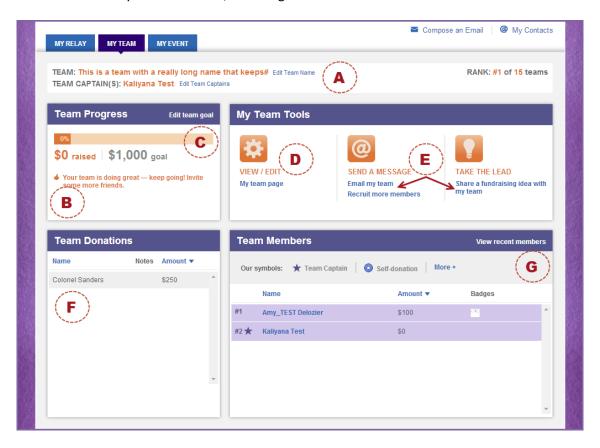
- 1. My Relay Tab from the My Relay tab you can perform the following functions:
  - A. Tour the tools available in the Relay Dashboard
  - B. View and edit your personal page
  - C. Send an email to your family and friends, asking for their support
  - D. View and edit your fundraising efforts towards 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

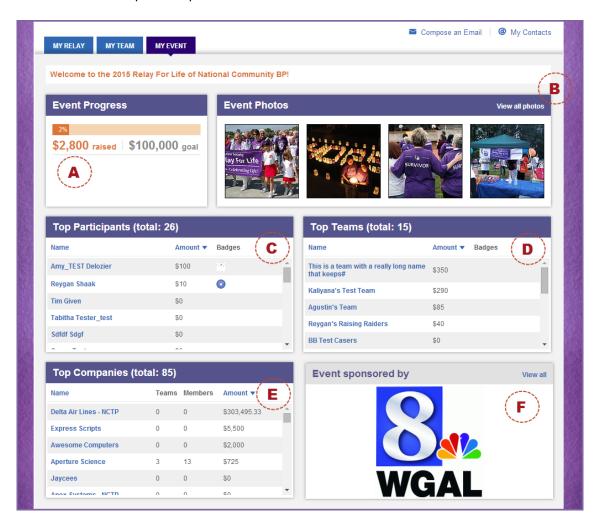


- 2. My Team Tab from the My Team tab you can perform the following functions:
  - A. Update the team name/team captains (Team Captain only)
  - B. View your team fundraising efforts towards the collective goal
  - C. Edit the team fundraising goal (Team Captain Only)
  - D. View the team page / Edit 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





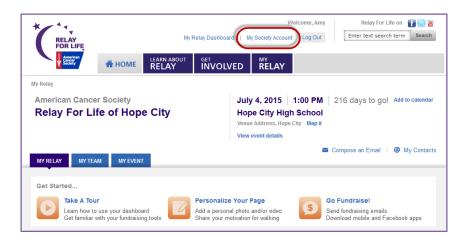
# **Chapter 3: Managing Your Online Information**

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

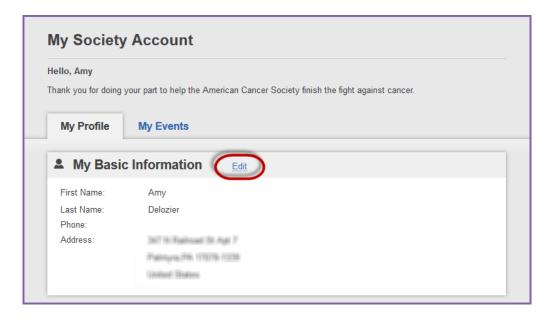
After you register online to participate in Relay For Life, you can manage and update your profile – including your name, contact information, username/password, and email preferences.

# **Update Your Relay For Life Online Profile**

- 1. Using your username and password, log into your **Society Account** (see <u>Chapter 1</u> 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.

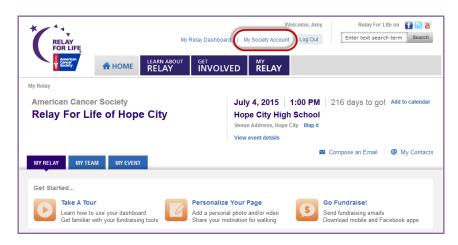


3. Click the blue **Edit** link to make changes to your biographical and contact information. Click **Update** to save your changes.

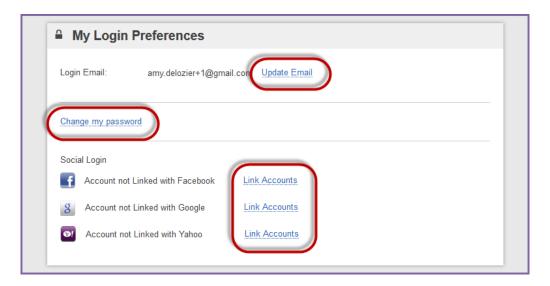


# **Update Your Login Preferences**

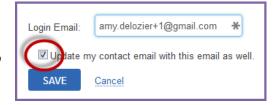
- 1. Using your username and password, log into your **Society Account** (see <u>Chapter 1</u> for more information on your Society Account). You will be automatically taken to your Relay Dashboard.
- 2. In the upper right-hand corner of the screen, click on the My Society Account link next to your name.



3. Scroll down to the Login Preferences section.



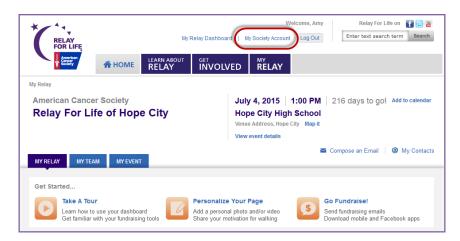
- Click the appropriate blue links to make changes to your login email and/or password. Make sure you always click Save / Update once you've made the desired changes.
  - a. **Note:** If you want to simultaneously update your contact email, so you also receive emails at your new email address, check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



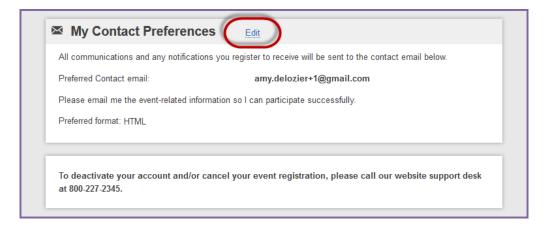
5. You can also choose to link your Society Account to your Facebook, Google or Yahoo login, which will allow for easier login in the future.

# **Update your Email Preferences**

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

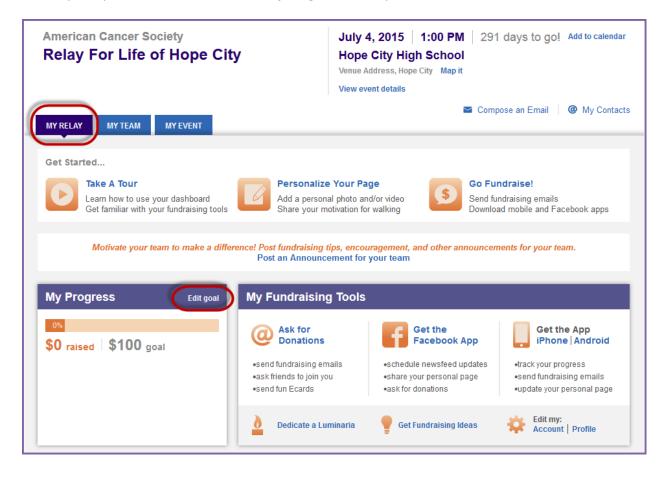
- Update your fundraising goal
- Customize your Personal Page
  - Edit your Personal Page
  - o Upload a photo or video to your Personal Page
- Create a personal URL

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.

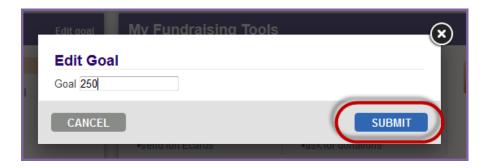
# **Update Your Fundraising Goal**

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.
- 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**

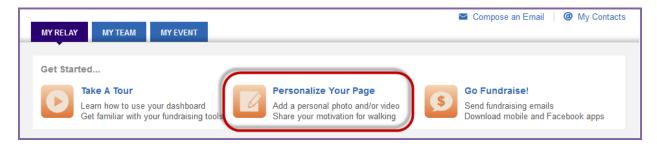
As an online Relay participant, you have access to a personal fundraising page that can be customized to reflect your reason for getting involved in Relay For Life and can be used to collect lifesaving donations.

## **Edit Your Personal Page**

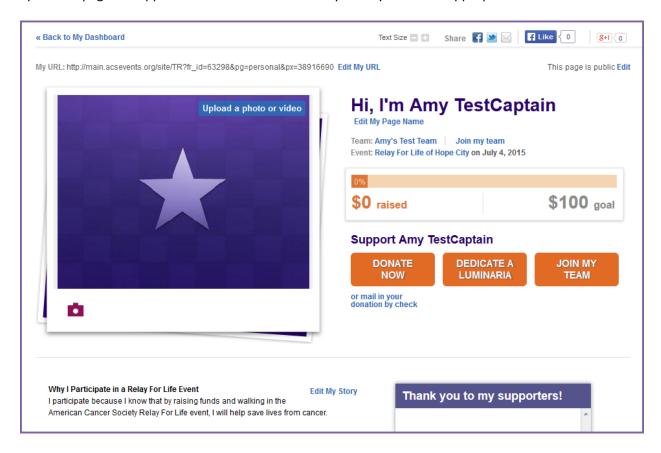
The Relay Dashboard offers you the opportunity to edit and update your personal fundraising page. By sharing your reason to Relay and photos or video, you can create a compelling webpage for your team building and fundraising efforts.



- 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).



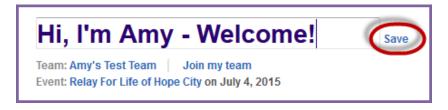
3. Your personal page will appear with several links so that you may make the appropriate edits.



- 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.

#### Why I Participate in a Relay For Life Event

I participate because I know that by raising funds and walking in the

American Cancer Society Relay For Life event, I will help save lives from cancer.

It's overwhelming to think that millions of people will be diagnosed with cancer this year. It might be someone close to us — or you or me...

A Relay For Life event is not only a way to join my community to fight back against cancer, but it is also a way to inspire hope by raising funds and cancer awareness to help those facing the disease.

#### Why I'm Fundraising

Relay participants, including me, all raise funds beca in some way and because a Relay For Life event gives is my opportunity to honor the cancer survivors in my li have lost, and help raise funds to support the America mission.

#### Why I Support the American Cancer Society

Every day, the American Cancer Society helps people cancer or find it early, when it is easiest to treat. They previous to cancer patients throughout their journey. To crucial research to prevent, treat, and ultimately, cure a

I have signed up to fundraise and walk in my local Rel consider joining my team or making a donation in sup

Together, we can finish the fight!



#### Why I Participate in a Relay For Life Event

Edit My Story

I participate because I know that by raising funds and walking in the American Cancer Society Relay For Life event, I will help save lives from cancer.

It's overwhelming to think that millions of people will be diagnosed with cancer this year. It might be someone close to us – or you or me...

A Relay For Life event is not only a way to join my community to fight back against cancer, but it is also a way to inspire hope by raising funds and cancer awareness to help those facing the disease.

#### Why I'm Fundraising

Relay participants, including me, all raise funds because we've been affected by cancer in some way and because a Relay For Life event gives us the power to fight back. This is my opportunity to honor the cancer survivors in my life, remember friends and family I have lost, and help raise funds to support the American Cancer Society's lifesaving mission.

#### Why I Support the American Cancer Society

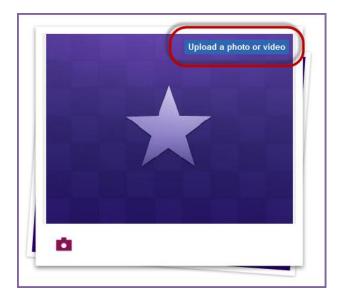
Every day, the American Cancer Society helps people take steps to reduce their risk of cancer or find it early, when it is easiest to treat. They provide free information and services to cancer patients throughout their journey. The organization is investing in crucial research to prevent, treat, and ultimately, cure all cancers.

I have signed up to fundraise and walk in my local Relay For Life event. I hope you will consider joining my team or making a donation in support of my efforts.

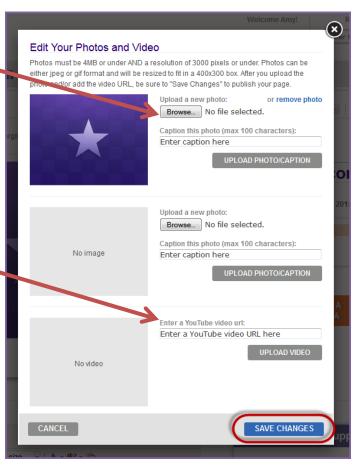
Together, we can finish the fight!

# 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: <a href="http://www.picresize.com/">http://www.picresize.com/</a>
  - 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.
  - 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: <a href="http://main.acsevents.org/goto/MelissaSmith">http://main.acsevents.org/goto/MelissaSmith</a>



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
  - o Edit a Contact
  - Delete a Contact
  - Create an Email Group
- Manage & Send Emails
  - o 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.



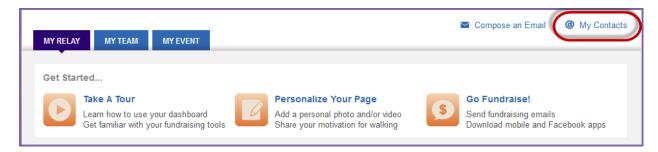
# **Managing Your Address Book**

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.

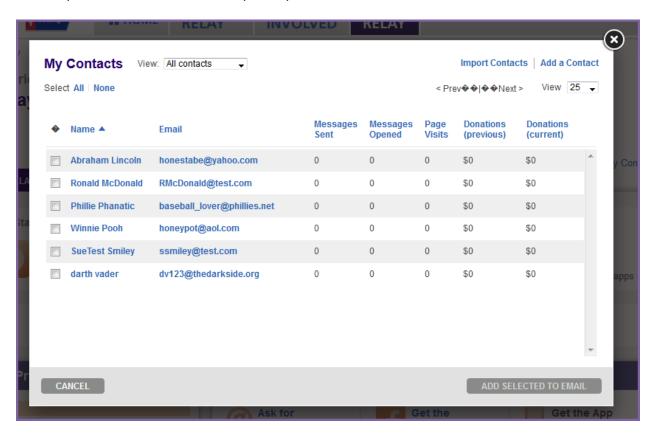
**Note**: The contact information in your address book is strictly for your use. Neither the American Cancer Society nor web system will send unsolicited email (spam) to your contacts in your address book, or sell the information to a third party.

#### **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.

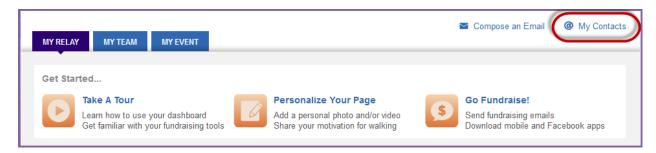


# **Import Contacts into Your Relay Dashboard Address Book**

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

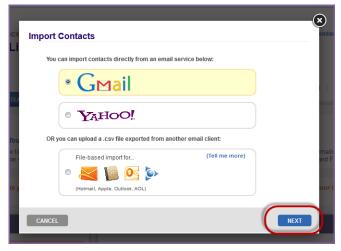
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



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

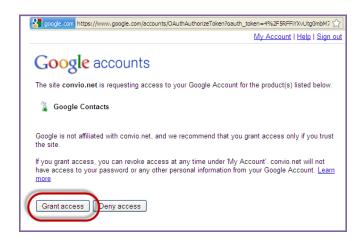


 Choose the email service provider where your contacts are stored by clicking the button beside the source. Choose Next.

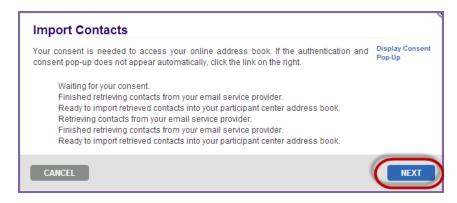


If you use an email service other than Gmail or Yahoo!, please export your current address book as a CSV file. Once the CSV file is created, you may upload them into the Relay Dashboard. More directions about importing a CSV file are available in the following section.

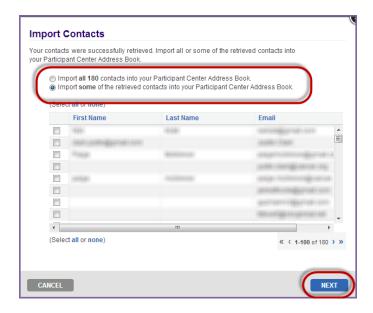
- 5. Enter the username and password for your email program and click **Sign In**.
- 6. Allow the Relay For Life website access to your email contacts by clicking **Grant Access**.



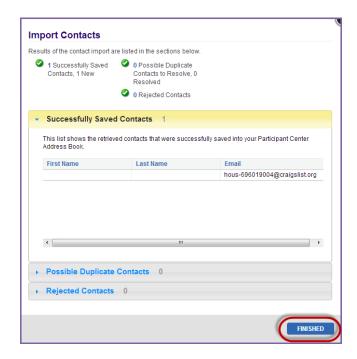
7. **Read** the consent agreement to allow the Relay Dashboard to access your online address book. **Click Next**.



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



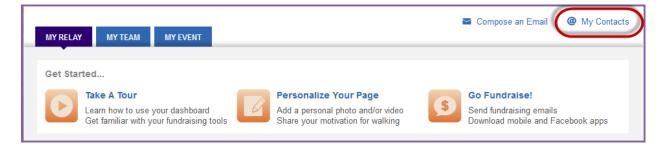
- If not all contacts are selected, individually choose which email addresses are to be uploaded by checking the box besides each record.
- b. Click Next.
- 9. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking **Finish**.



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

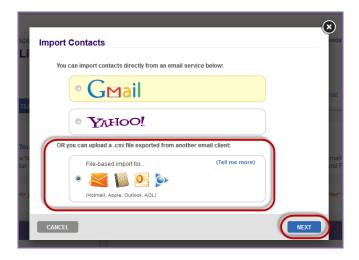
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



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



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



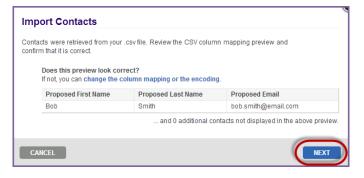
a. Before uploading your contact file, ensure that the document is in the proper format and saved as a CSV or comma delimited option document as exampled below.

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

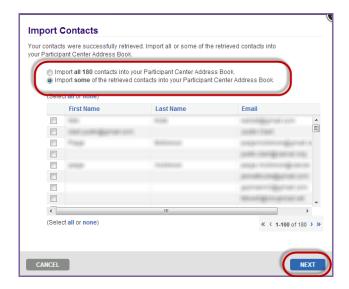
- b. More instructions regarding formatting the CSV email address file can be found here
- 5. Browse for the CSV file on your computer before clicking Next.



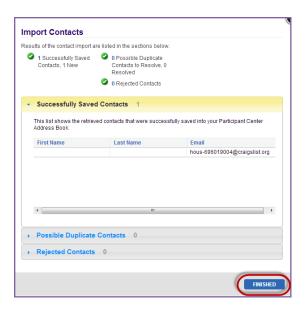
6. Review the preview of the addresses that have been uploaded into the Relay Dashboard. Click Next.



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.** 



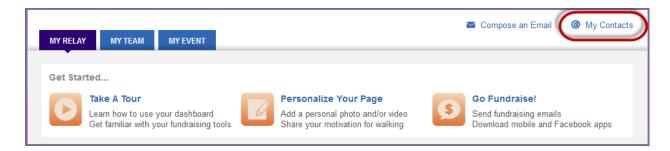
- If not all contacts are selected, individually choose which email addresses are to be uploaded by checking the box besides each record.
- b. Click Next.
- 8. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking Finish.



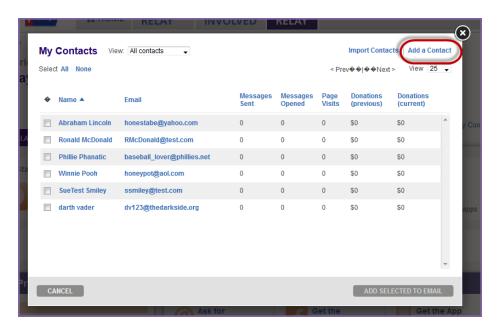
9. Your personal email Address Book has been successfully uploaded into the Relay Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

### Manually Add Contacts to Your Address Book

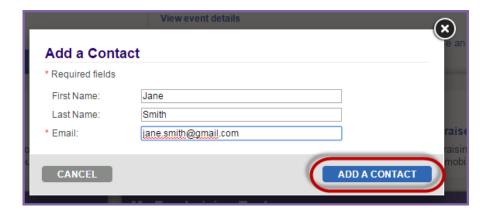
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



- 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.

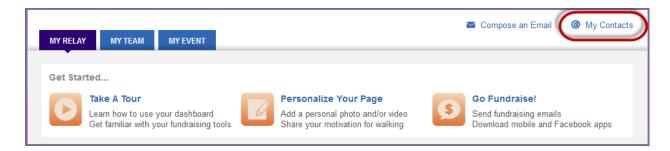


5. Add the new contact's First Name, Last Name and Email and click Add a Contact.

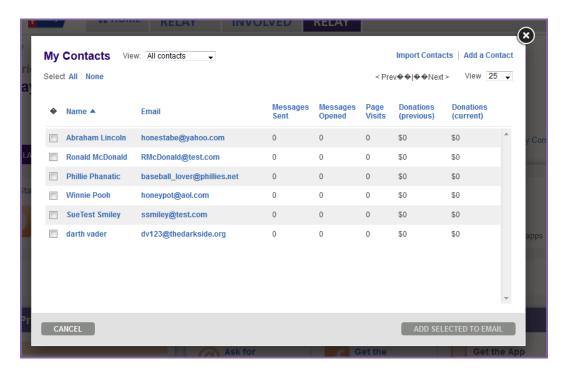


### **Edit a Contact in your Address Book**

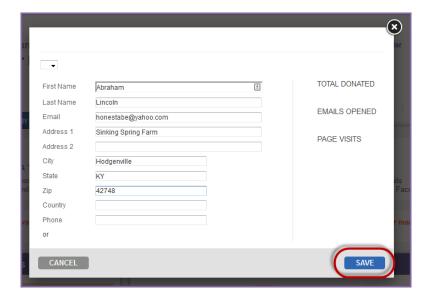
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



- 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.



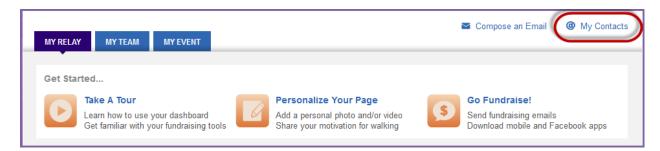
- 4. Simply click on the name of a contact you wish to edit.
- 5. Update the contact's information and click Save.



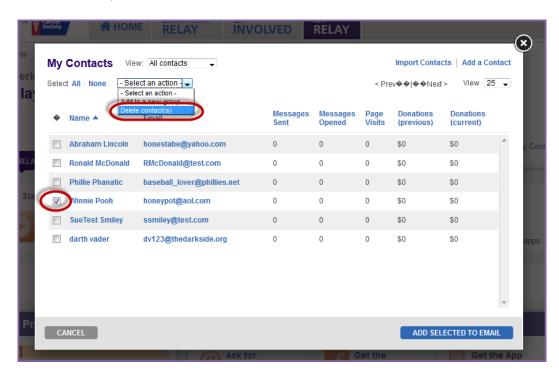
### Delete a Contact in your Address Book

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

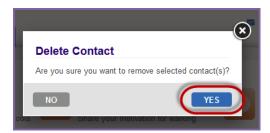
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



- 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)**.



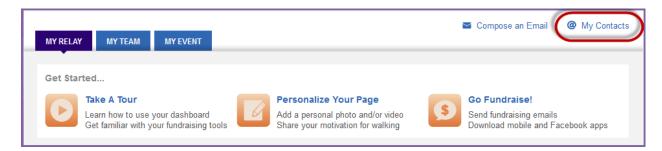
5. **Confirm** to delete the contact from the Relay Dashboard Address Book.



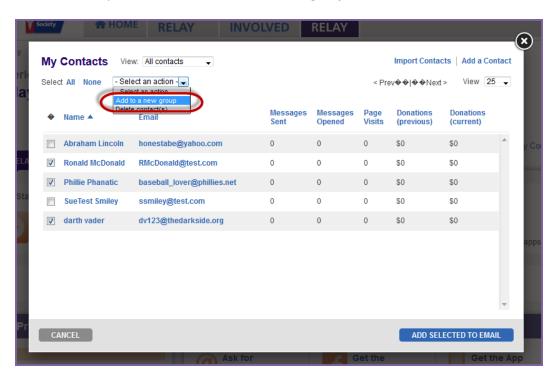
### **Create an Email Group**

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.

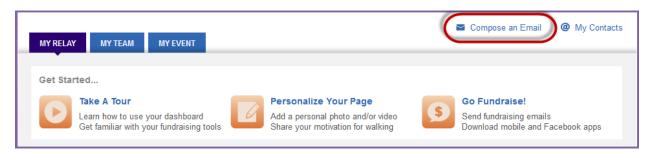
Using a well-crafted team building or donation request emails can help direct people to your personal page quickly and encourage support. All emails from the Relay Dashboard will automatically link the recipient back to your personal page and team page.

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.

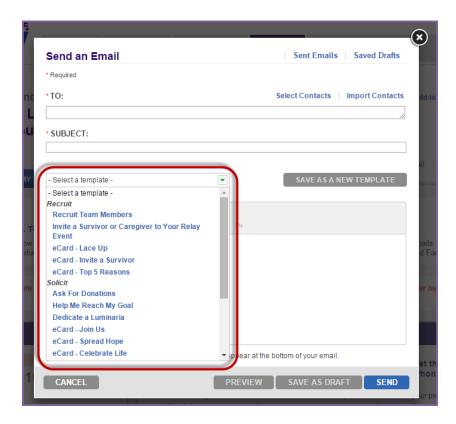
Start sending emails today and watch your team and fundraising soar!!

## **Edit and Send a Message**

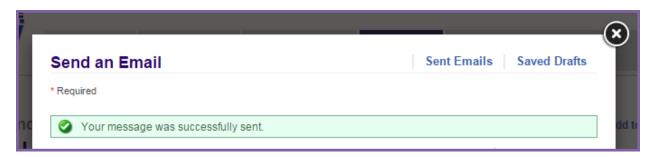
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the **Compose an email** link found on the right hand side of the page.



- 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



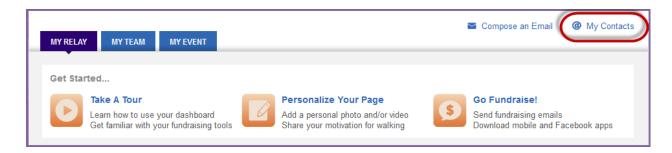
- 5. Make any changes to the **Subject** and the **Message** text.
- 6. Click **Preview** to see your email message before you send it.
- 7. Click **Save as Draft** if you want to save this message for future use.
- 8. Click **Send** to deliver this message to everyone you have added as a recipient of this email. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.



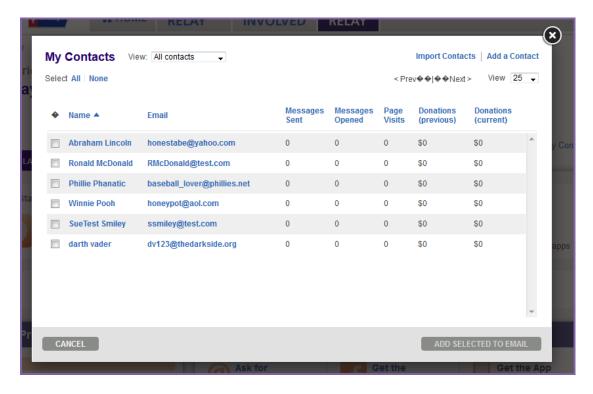
#### **Track Email Contacts**

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.

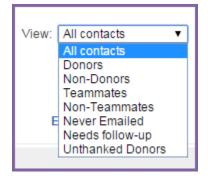
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From any section of the Relay Dashboard, click the My Contacts link found on the right hand side of the page.



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.
  - 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
  - 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.



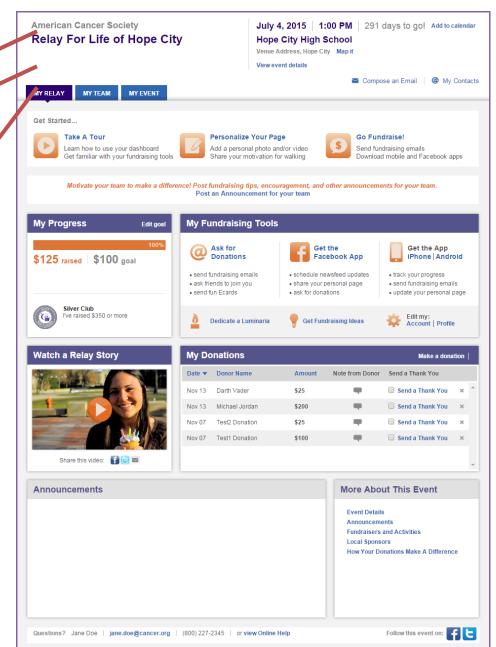
# **Chapter 6: Managing Your Fundraising Success**

- 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**

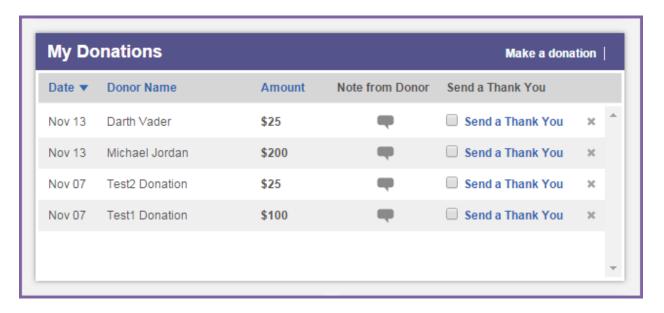
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From the My Relay tab you can perform the following functions:



- 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**

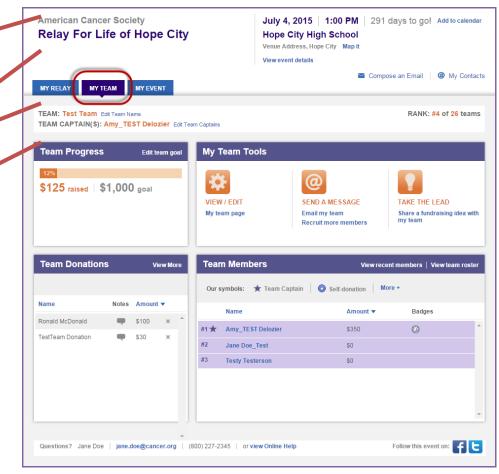
- View Team's Progress
- View a List of Team Members
- · Share Fundraising Tips with Your Team

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 <u>next chapter</u> of the manual.

## **View Your Team's Progress**

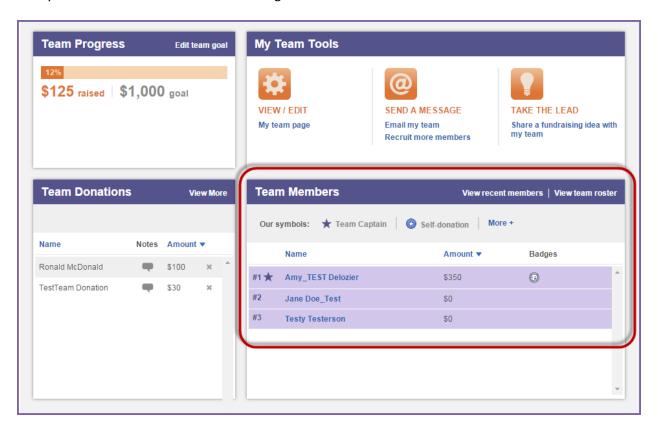
- 1. Using your username and password, log into your **Relay Dashboard**.
- 2. From the My Team tab, you can:



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

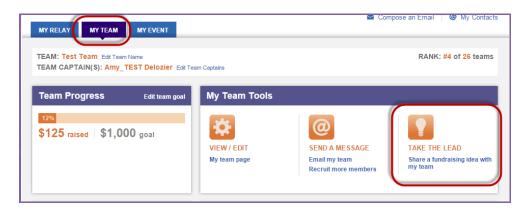
### **View a List of Team Members**

- 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.

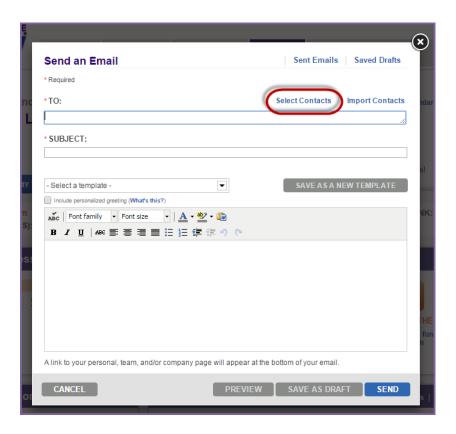


## **Share Fundraising Ideas with Your Team**

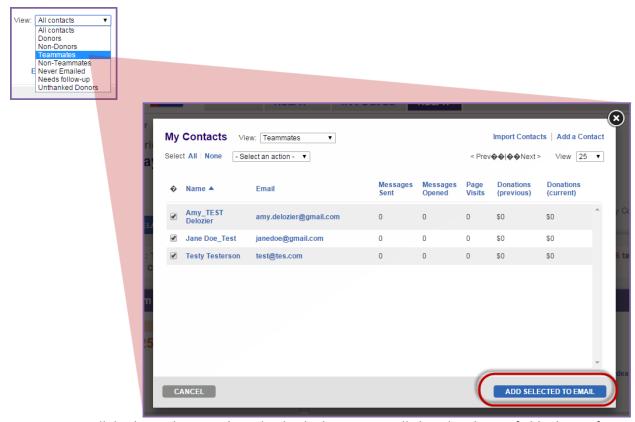
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From the My Team tab, click the **Share a fundraising idea with my team** link in the My Team Tools box (right hand side of the page).



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

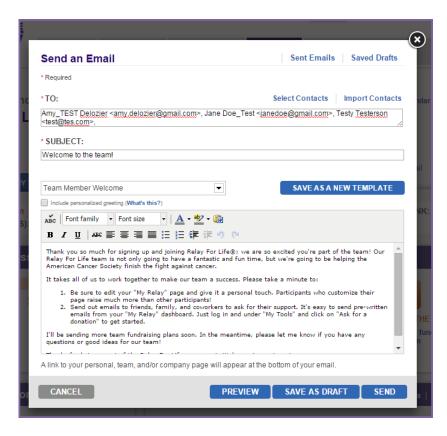


- 4. Using the drop down menu to filter the email contacts by the **Teammates group**.
- 5. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message.



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**

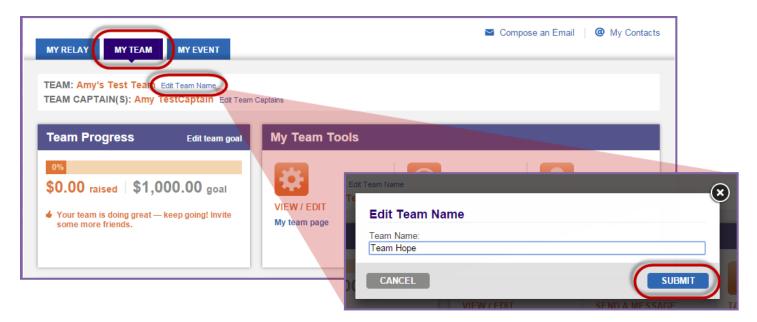
- Update Your Team Name
- Change the Team's Fundraising Goal
- View/Edit Your Team Page
- Create a Team URL
- Post an Announcement for your Team in the Relay Dashboard
- Send an Email to Your Team Members
- View Your Team's Progress
- View a List of Team Members

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.

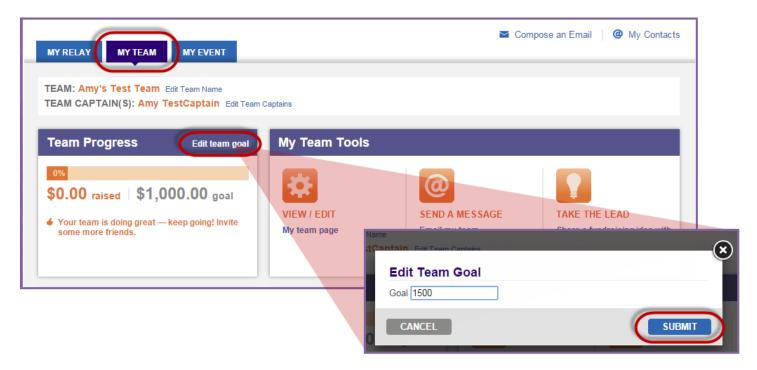


# **Change your Team Fundraising Goal**

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**.

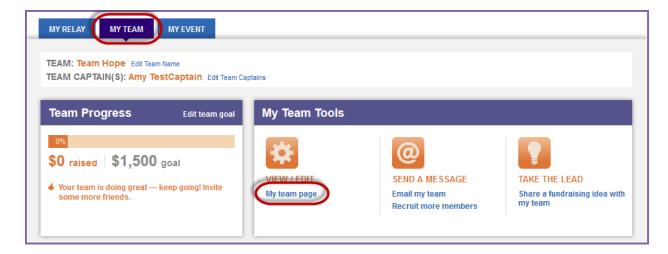
- 2. From the My Team tab, click Edit team goal in the Team Progress box (top left hand side)
- 3. Enter a new team goal before clicking **Submit**.



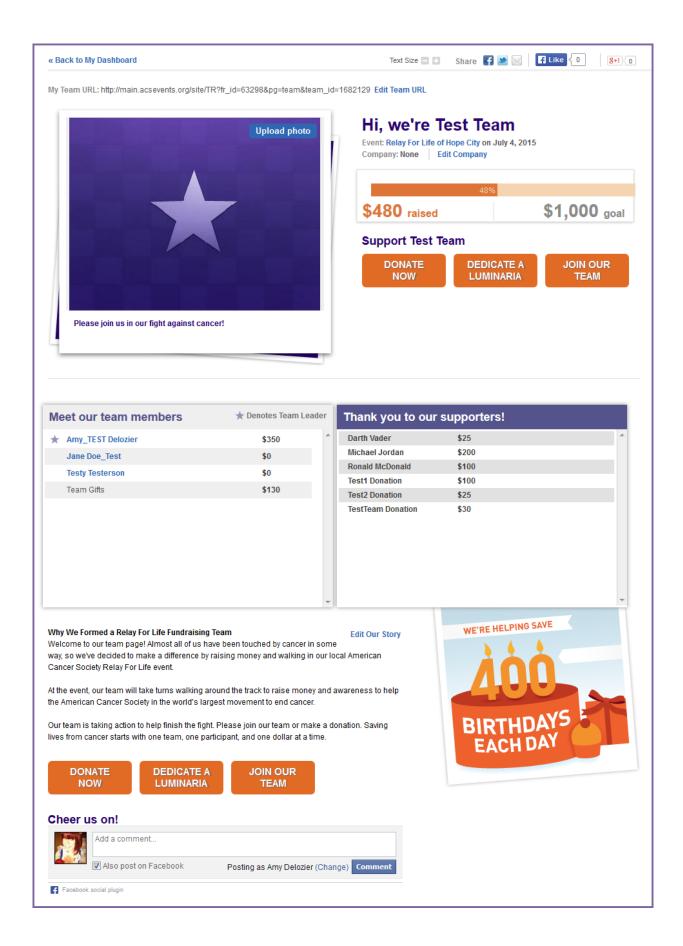
## **View / Edit Your Team Page**

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



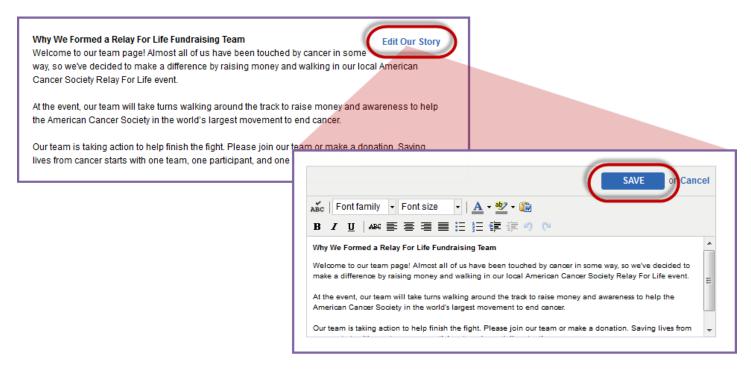
3. Your team page will appear with several links so that you may make the appropriate edits.



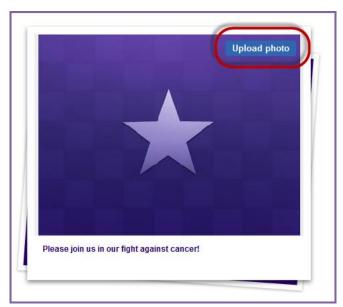
4. Edit the team's company affiliation by selecting Edit Company under the header of the page before clicking Save.



- 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



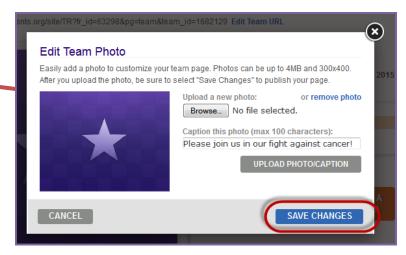
6. To add a photo to your team page click the **Upload photo** button beside the image area.



- 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

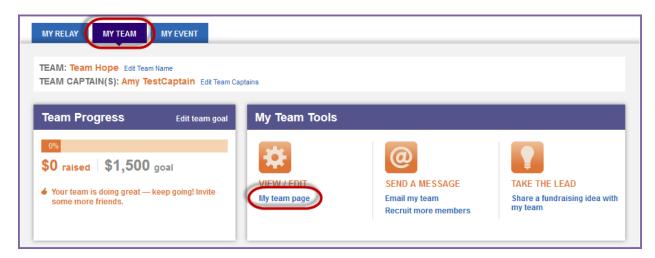
crop the image to ensure the best fit, especially if the photo is quite large. Here is an easy web-based photo resizer you can use to get your pictures down to the right size: http://www.picresize.com/

- 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

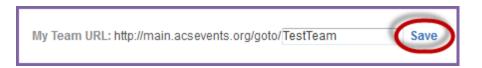
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From the My Team tab, click the My Team Page link in the My Team Tools box (right hand side of the page).



- 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: <a href="http://main.acsevents.org/goto/TeamAwesome">http://main.acsevents.org/goto/TeamAwesome</a>

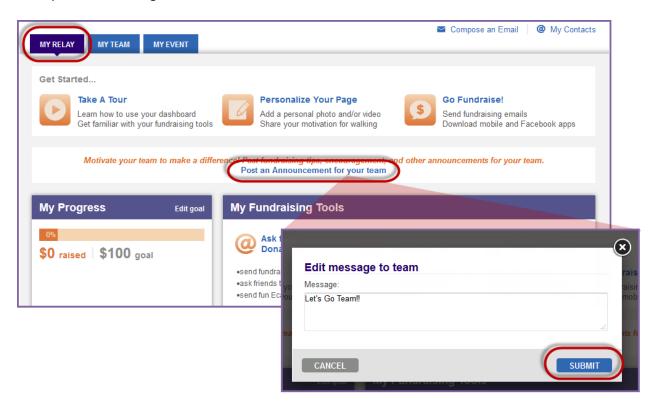


6. Click **Save.** Once a team URL has been created, the team captain / team members may add it to their email signature, post it on the Social Media sites, and provide a direct link for potential donors on paper materials.

## 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.

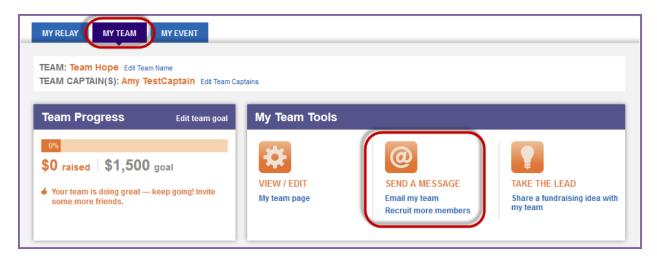


4. The message will then appear on your team members' My Relay home page.

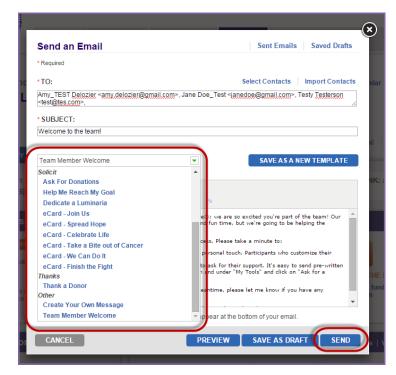
#### Send an Email to Your Team Members

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).

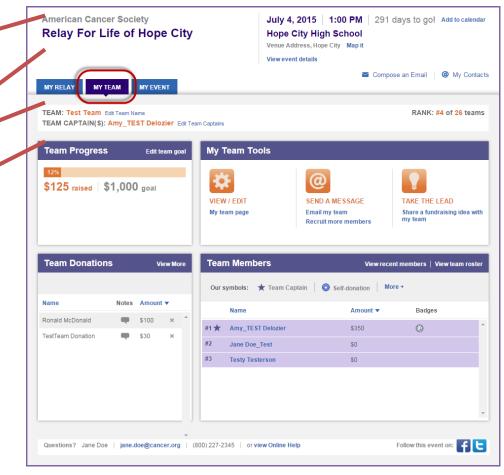


- 3. The **Send an Email** overlay will appear.
  - a. Your name and your email address will automatically populate as the sender's address.
  - b. Your teammates email address will auto-populate into the To: field.
- 4. If you need help deciding what to write in your email, choose one of the template 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.
- Make any changes to the Subject and the Message text.
- 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**

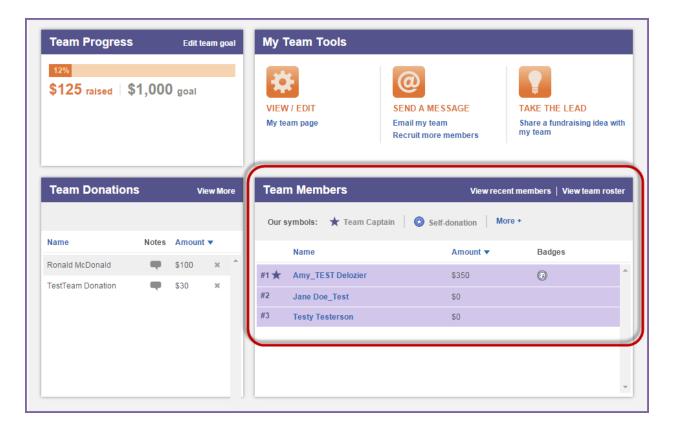
- 1. Using your username and password, log into your Relay Dashboard.
- 2. From the My Team tab, you can:



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

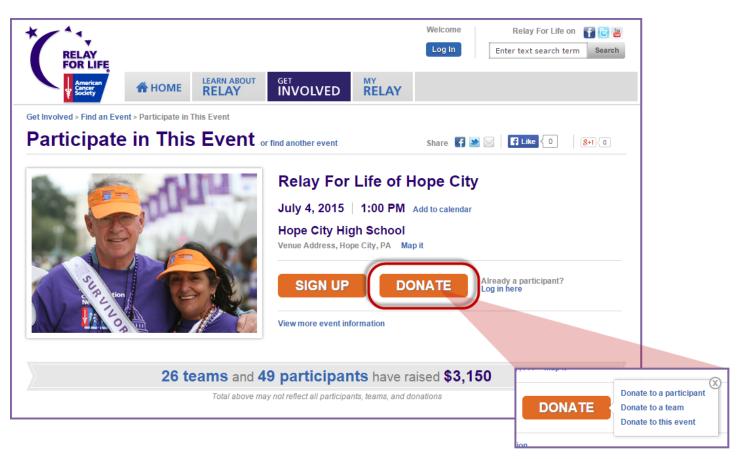
- Make an Online Donation
- Print an Offline Donation Form
- Make a Luminaria Donation

#### 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!

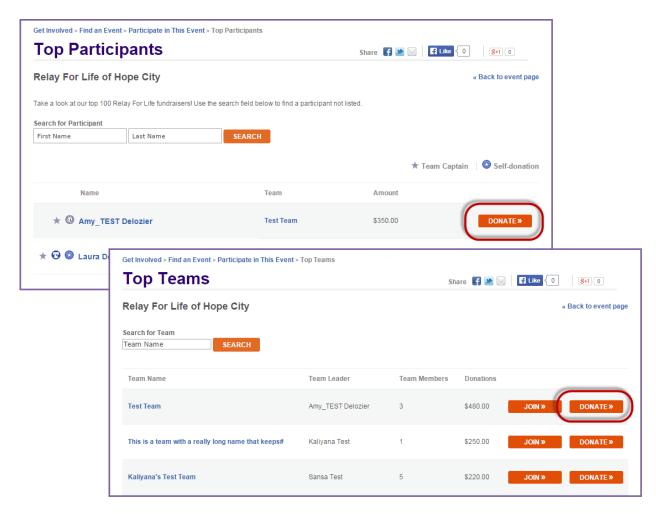
- From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event
  website will appear. If you do not know your event's friendly URL, you can search for your Relay at <u>relayforlife.org</u>.
- 2. Click on the **Donate** link.
- 3. Upon clicking the Donate button, you can select who the donation will support: a **Team**, **Participant** or the general **Event**. Click the appropriate link.



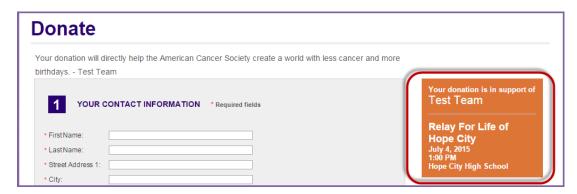
If selecting to make your donation to a participant or team, a listing of available online Relayers or teams will appear
as your search results.

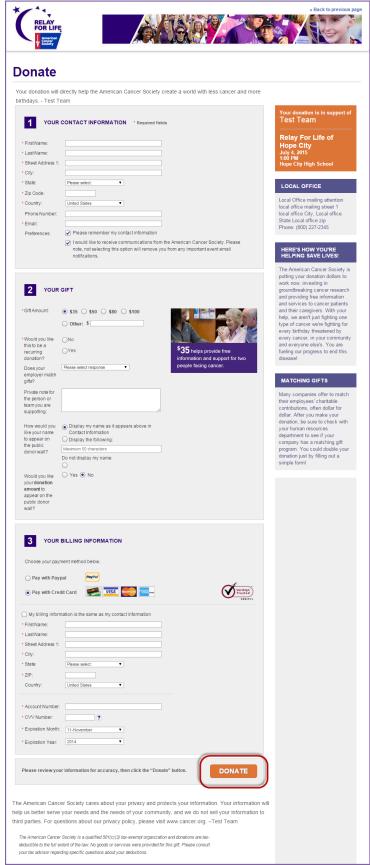
**Note:** If you select to donate to a participant, only those participants who currently have funds raised will appear in the list, however you can use the search function to locate any participants currently registered on the online website.

- 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.



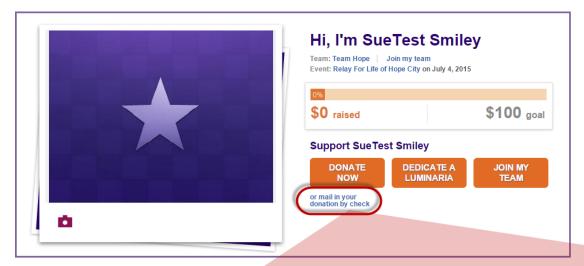


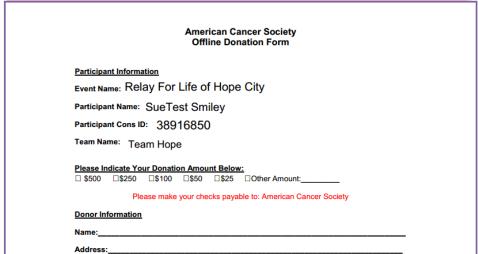
- 6. Step 1: YOUR CONTACT INFORMATION
- a. Enter your **Contact Information**.
- b. Select / unselect the preferences:
- i. Please remember my contact information
- I would like to receive communications from the American Cancer Society. Please note, not selecting this option will remove you from any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

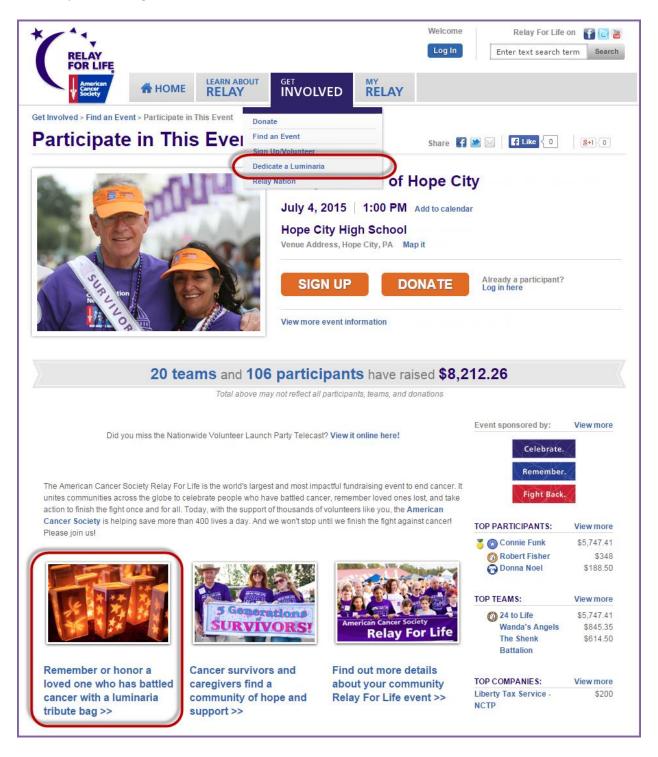




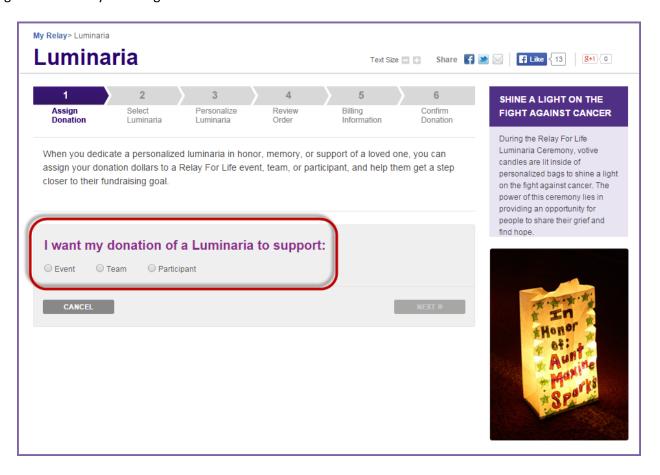
- 2. Complete the form and include it with your donation. Be sure to mail the form to the local American Cancer Society office listed.
- 3. Don't forget to send a separate email to the participant to let them know you are sending in a donation to the American Cancer Society.

### **Make a Luminaria Donation**

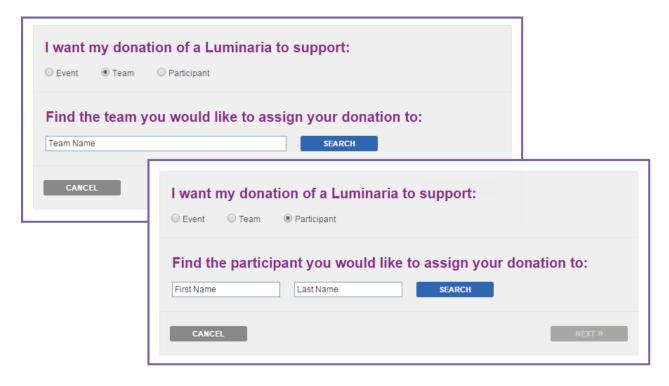
- From your internet browser, type your event's friendly URL (www.relayforlife.org/EventNameST) and your event
  website will appear. If you do not know your event's friendly URL, you can search for your Relay at <u>relayforlife.org</u>.
- 2. Click on the **Dedicate a Luminaria** link on the event greeting 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.



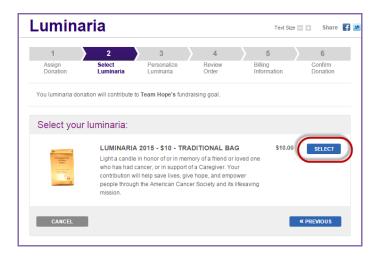
4. If donating to a team or individual, type in the individual/group information in the search field before clicking **Search**. If donating to an event, simply begin completing the donation form (skip to step 5).



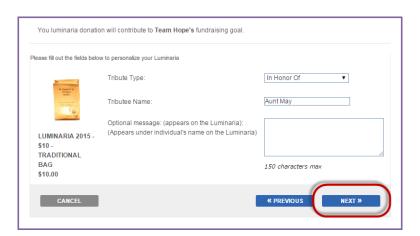
a. From the search results, click **select** beside the Team/Participant you wish to make a luminaria donation to. Click **Next**.



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

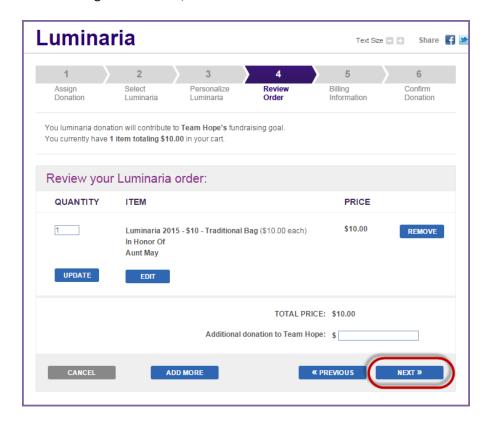


- 6. Personalize the luminaria bag:
  - a. Add In Honor or In Memory.
  - b. Provide the **name** and (optional) **message** to be displayed on the luminaria.
  - c. 'Click Next.



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.