

St. Jude patient
Hadley, age 3,
acute myeloid leukemia

Event Management Center TeamRaiser Tutorials



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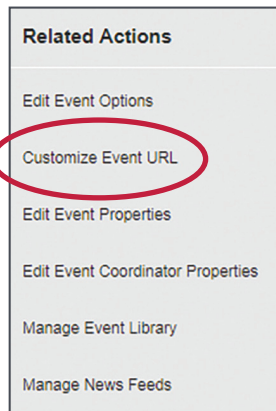
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Edit Event Details

Customize your event link


1. On your home tab, click **Customize Event URL** to create an easy-to-remember vanity URL for your direct event page.



2. Using the editable text box, write your **School Name Followed by SJUtD (One Word)**, then click **Finish** to update that link. <http://fundraising.stjude.org/schoolnameSJUtD> will be your new vanity URL link.

Home	Email	Management	Reports	Manage A Different Event
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Customize Event URL

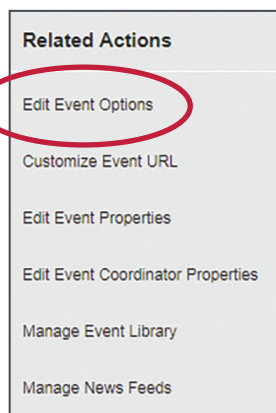
 **1. Customized URL for the Event Page:**

Defines a shortcut Web address that displays the event Greeting page. (In addition to letters and numbers, the URL can contain only the dash and underscore special characters).

<http://fundraising.stjude.org/>

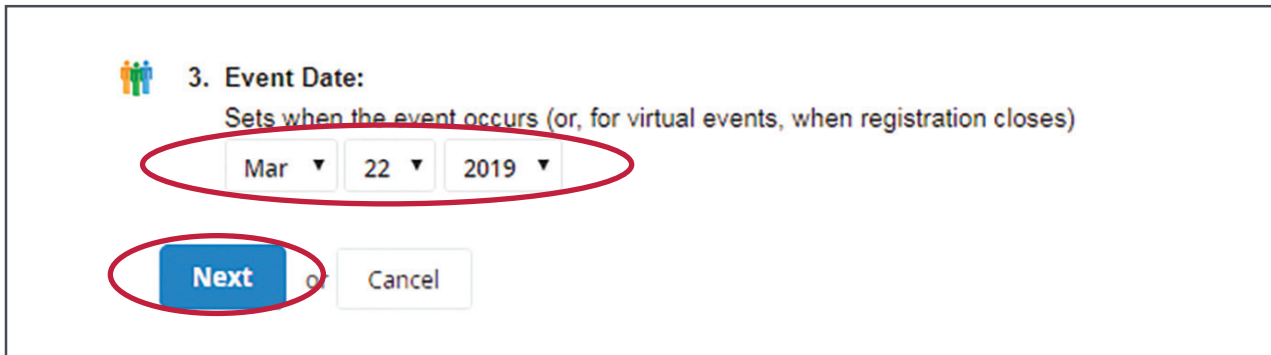
Edit your event date

1. On your home tab, click **Edit Event Options**, then click **Edit Event Information**.



Edit your event date cont.

2. Update your finale event date using the **Month, Date, Year Drop Down**. This will update your date on the national SJUtD landing page and in the SJUtD reports. Click **Next**, then **Finish** on the subsequent screen.



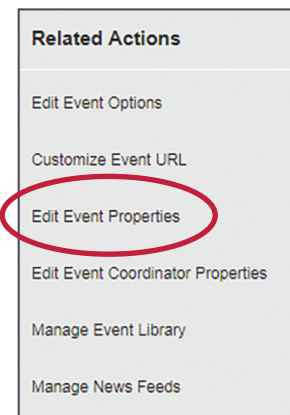
3. Event Date:
Sets when the event occurs (or, for virtual events, when registration closes)

Mar ▼ 22 ▼ 2019 ▼

Next or Cancel

You will also have to change the date in the event page properties to update the date shown on your school's event page.

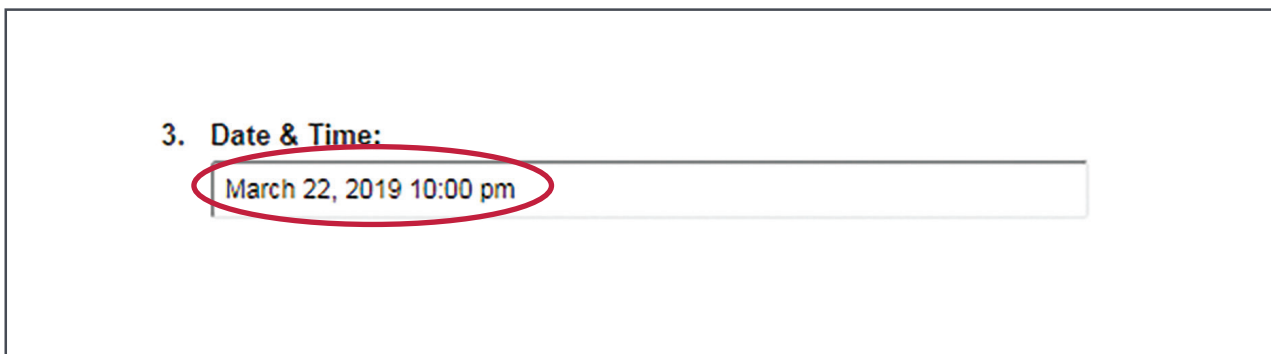
3. Click back to the home tab, and click **Edit Event Properties**.



Related Actions

- Edit Event Options
- Customize Event URL
- Edit Event Properties**
- Edit Event Coordinator Properties
- Manage Event Library
- Manage News Feeds

4. Update the date under **Date & Time**. You may also add a registration time here, if needed. Click **Finish** when complete.



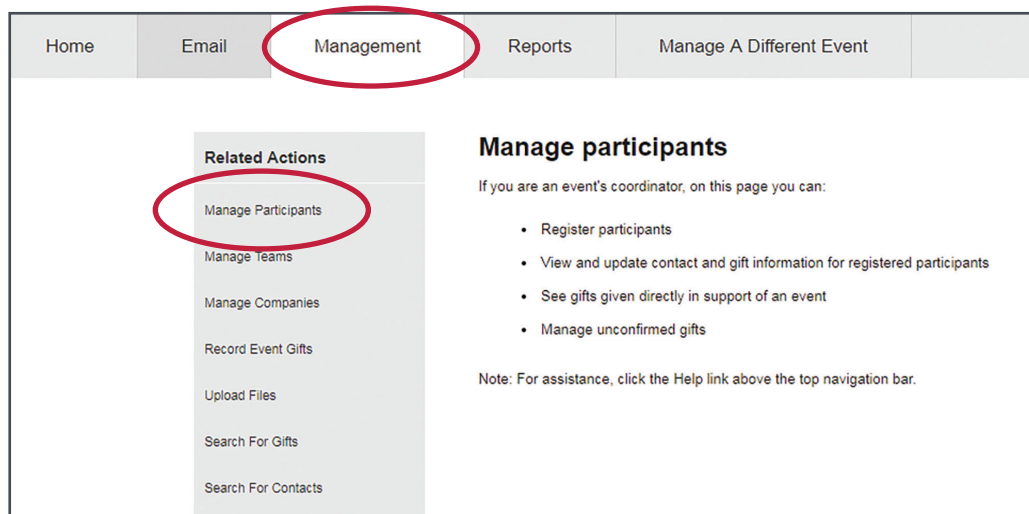
3. Date & Time:

March 22, 2019 10:00 pm



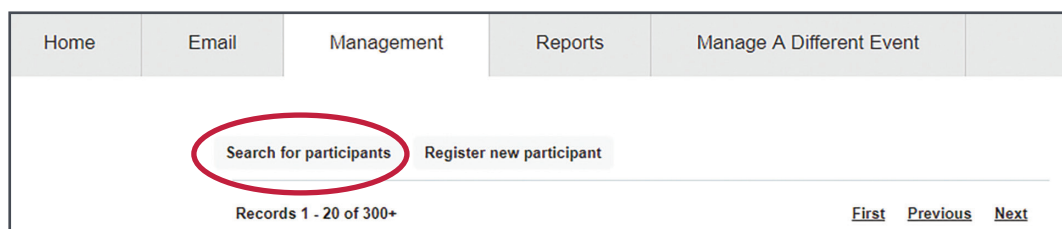
Manage a Participant

1. On your home tab, click the **Management** tab, and then click **Manage Participants**.



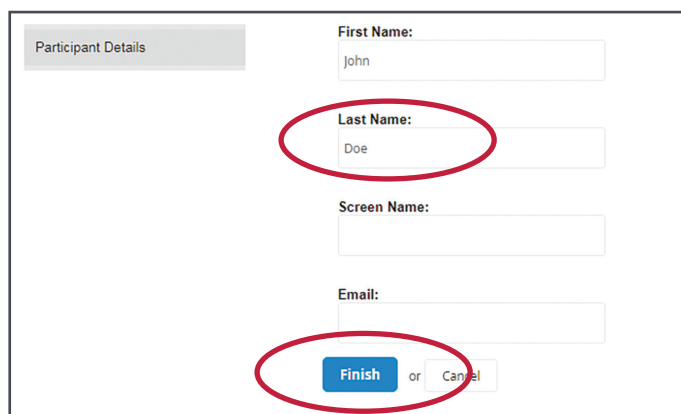
The screenshot shows the top navigation bar with tabs: Home, Email, Management (highlighted with a red circle), Reports, and Manage A Different Event. Below the navigation bar, on the left, is a sidebar titled 'Related Actions' containing a list of options: Manage Participants (highlighted with a red circle), Manage Teams, Manage Companies, Record Event Gifts, Upload Files, Search For Gifts, and Search For Contacts. The main content area is titled 'Manage participants' and includes a description: 'If you are an event's coordinator, on this page you can:' followed by a bulleted list: Register participants, View and update contact and gift information for registered participants, See gifts given directly in support of an event, and Manage unconfirmed gifts. A note at the bottom states: 'Note: For assistance, click the Help link above the top navigation bar.'

2. Click **Search for participants**.



The screenshot shows the top navigation bar with tabs: Home, Email, Management (highlighted with a red circle), Reports, and Manage A Different Event. Below the navigation bar, there are two buttons: 'Search for participants' (highlighted with a red circle) and 'Register new participant'. Below the buttons, it says 'Records 1 - 20 of 300+' and there are links for 'First', 'Previous', and 'Next'.

3. Enter the participant's name or email then click **Finish** to search for the participant.



The screenshot shows the 'Participant Details' form. It has a sidebar on the left with the title 'Participant Details'. The form fields are: First Name (with 'John' entered), Last Name (with 'Doe' entered and highlighted with a red circle), Screen Name, and Email. At the bottom, there is a blue 'Finish' button (highlighted with a red circle) and a 'Cancel' button. The text 'or' is between the two buttons.



View participant gifts & status

1. Click the **Manage Participant** link next to the participant you'd like to view.

Search for participants		Show All Participants	Register new participant
Records 1 - 1 of 1		First	Previous Next Last
Name	Action	Email	TeamRaiser Name
Thomas, Danny	Manage Participant	danny.thomas@stjude.org	University of Memphis UTD FY19
Records 1 - 1 of 1		First	Previous Next Last

2. Use the summary page to review the participants team, team rank (captain or team member), fundraising goal, money raised and a list of gifts made to that individual that are showing on their page. You can also promote the participant to a team captain, change their team, make inactive, etc. using the tabs to the right.

Transfer to a new team

1. To move the participant to an existing team, click **Change Team** and then click **Select** next to the team name you would like to move them to. When prompted, click **Finish** to complete the move.
2. To move this person to a team that does not yet exist, click **Create New Team**. You will be prompted to create a new team name and then click **Finish** to create the team and place the participant on the team.
3. If you would like to take a participant off the team and leave them as an unassigned individual, click **Remove From All Teams** and then **Finish**.

Related Actions	Summary
Record Donation	ID: 5003224
Edit Contact Information	Phone: (901) 999-1962
Edit Registration	Name: Danny Thomas
Make Inactive	Email: danny.thomas@stjude.org
Make Hidden	Username: thomasd
Create New Team	Participation Type: Up 'til Dawn fundraising participant
Change Team	Registration Type: Online
Reset Password	Fundraising Goal: \$150.00
Edit Pages	Total Amount Raised: \$40.00
	Registration Status: Active
	Personal Page: Searchable
	Gift History
	Records 1 - 2 of 2
	First Previous Next Last
	<input type="text"/> <input type="button" value="Q Search"/> <input type="button" value="Show All"/>
	Page 1 of 1 <input type="text"/> To Page <input type="button" value="Go"/>



Manage a Team

View team roster

1. On your home tab, click on the **Management** tab, then **Manage Teams**.

Related Actions

Manage Participants

Manage Teams

Manage Companies

Record Event Gifts

Upload Files

Search For Gifts

Search For Contacts

2. Click the **Manage** link next to the team you want to view/edit.

Name	Action	Team Captain	Company	Team Goal
Executive Team Danny ID: 222024	Manage Disband Team	Thomas, Danny danny.thomas@stjude.org		\$5,000.00

3. You will see all gifts made to the team on the **Gifts** tab. To view the team roster and manage each member, click the **Members** tab.

Executive Team Danny (ID: 222024)

Captain:
Thomas, Danny
501 St. Jude Place

Memphis, TN 38105

danny.thomas@stjude.org
9019991962

Previous Event: None
First event: St. Jude Up 'til Dawn
at University of Memphis (92538)

Active Members: 5
Team Goal: \$5,000.00
Confirmed Gifts: \$7,603.00 (152.06%)
Total Gifts: \$7,838.00 (156.76%)

[Gifts](#) [Members](#)



Change the team captain

1. On the **Members** tab, select **Manage Participant** next to the person you would like to promote to team captain.

Name	Action
Toti Cuervo(captain)	Manage Participant
Kayla Hill	Manage Participant
Charley Johnson	Manage Participant
Kennedie Toney	Manage Participant
Makenzie White	Manage Participant

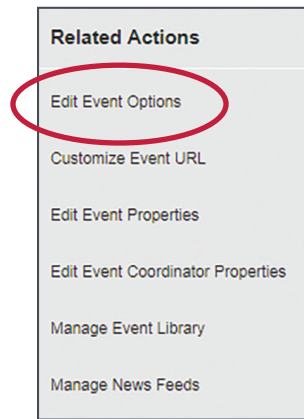
2. Then, click **Promote to Captain** on the right hand side. Reminder: you must promote a new captain before removing the prior captain.

Related Actions
Record Donation
Edit Contact Information
Edit Registration
Make Inactive
Remove From All Teams
Make Hidden
Create New Team
Change Team
Promote to Captain
Promote to Co-Captain
Reset Password
Edit Pages

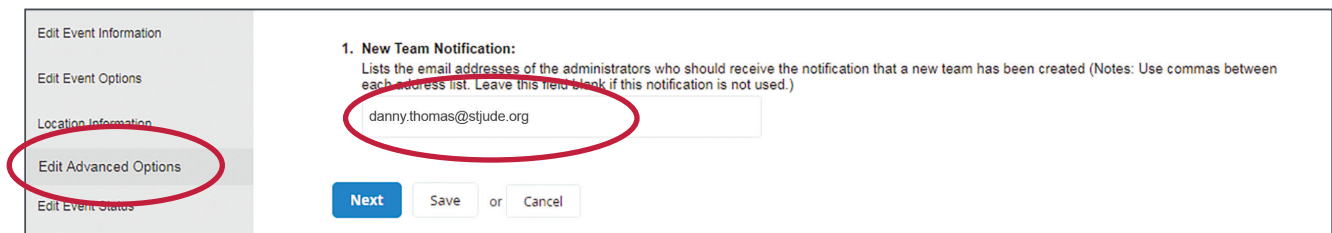


Set new team alerts

1. On your home tab, click **Edit Event Options**.

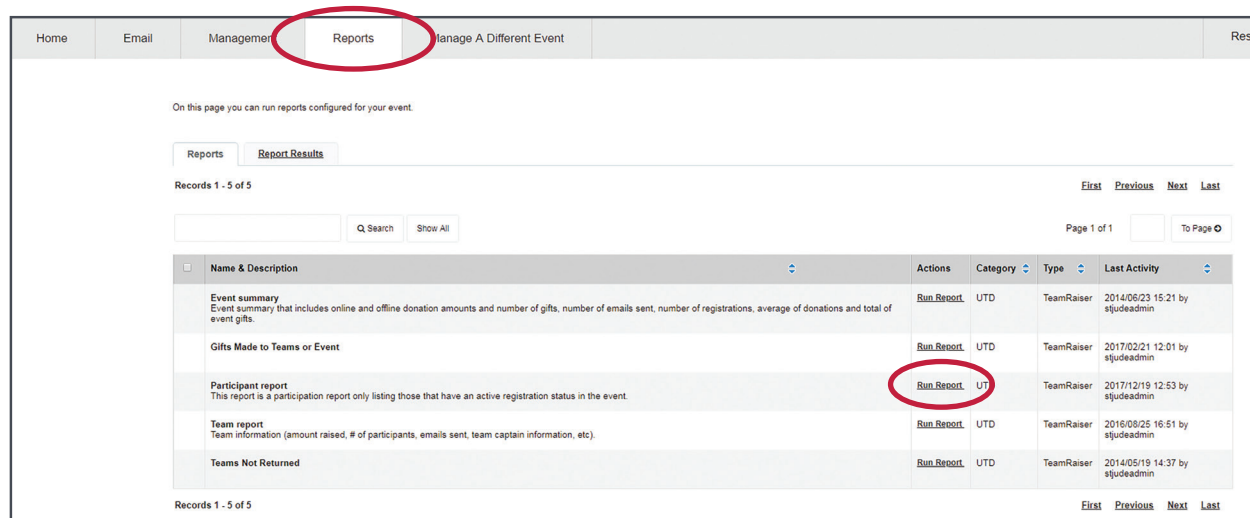


2. Next, click **Edit Advanced Options** and then **Add the Emails** of desired recipients to receive alerts in the editable field. Use a comma or semicolon to add multiple emails. Click **Next**, and then **Finish** on the subsequent page.

A screenshot of the 'Edit Advanced Options' page. On the left is a sidebar with a list of options: 'Edit Event Information', 'Edit Event Options', 'Location Information', 'Edit Advanced Options' (which is circled in red), and 'Edit Event Status'. The main content area is titled '1. New Team Notification:' and contains a text box with the email address 'danny.thomas@stjude.org' entered. Below the text box are three buttons: 'Next' (in blue), 'Save', and 'Cancel'.

Pull a Participant or Team Report

1. Click the **Reports** tab and select the type of report you'd like to run by clicking the adjacent **Run Report** link. The two reports you should be familiar with are:
 - Participant report – A complete list of all registered participants with their team, the number of emails they've sent, if/when they updated their page, their fundraising goal and their current fundraising total.
 - Team report – A list of teams registered with the number of participants on the team, total emails sent by the team, team fundraising goal and current fundraising total.



On this page you can run reports configured for your event.

Reports **Report Results**

Records 1 - 5 of 5

First Previous Next Last

Page 1 of 1 To Page

Name & Description	Actions	Category	Type	Last Activity
Event summary Event summary that includes online and offline donation amounts and number of gifts, number of emails sent, number of registrations, average of donations and total of event gifts.	Run Report	UTD	TeamRaiser	2014/06/23 15:21 by stjudeadmin
Gifts Made to Teams or Event	Run Report	UTD	TeamRaiser	2017/02/21 12:01 by stjudeadmin
Participant report This report is a participation report only listing those that have an active registration status in the event.	Run Report	UT	TeamRaiser	2017/12/19 12:53 by stjudeadmin
Team report Team information (amount raised, # of participants, emails sent, team captain information, etc).	Run Report	UTD	TeamRaiser	2016/08/25 16:51 by stjudeadmin
Teams Not Returned	Run Report	UTD	TeamRaiser	2014/05/19 14:37 by stjudeadmin

Records 1 - 5 of 5

First Previous Next Last

2. Click **Next**.

* **1. Report Label:**
Enter a label to identify the purpose of or data gathered by this report.

Participant report

2. Report Description:
Enter a phrase or statement to distinguish this report from others with similar names.

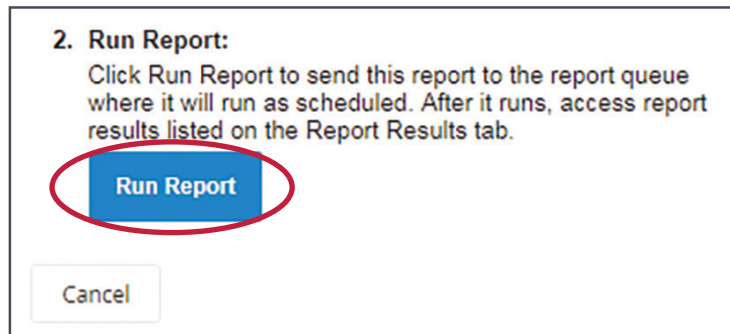
This report is a participation report only listing those that have an active registration status in the event.

Next or Cancel



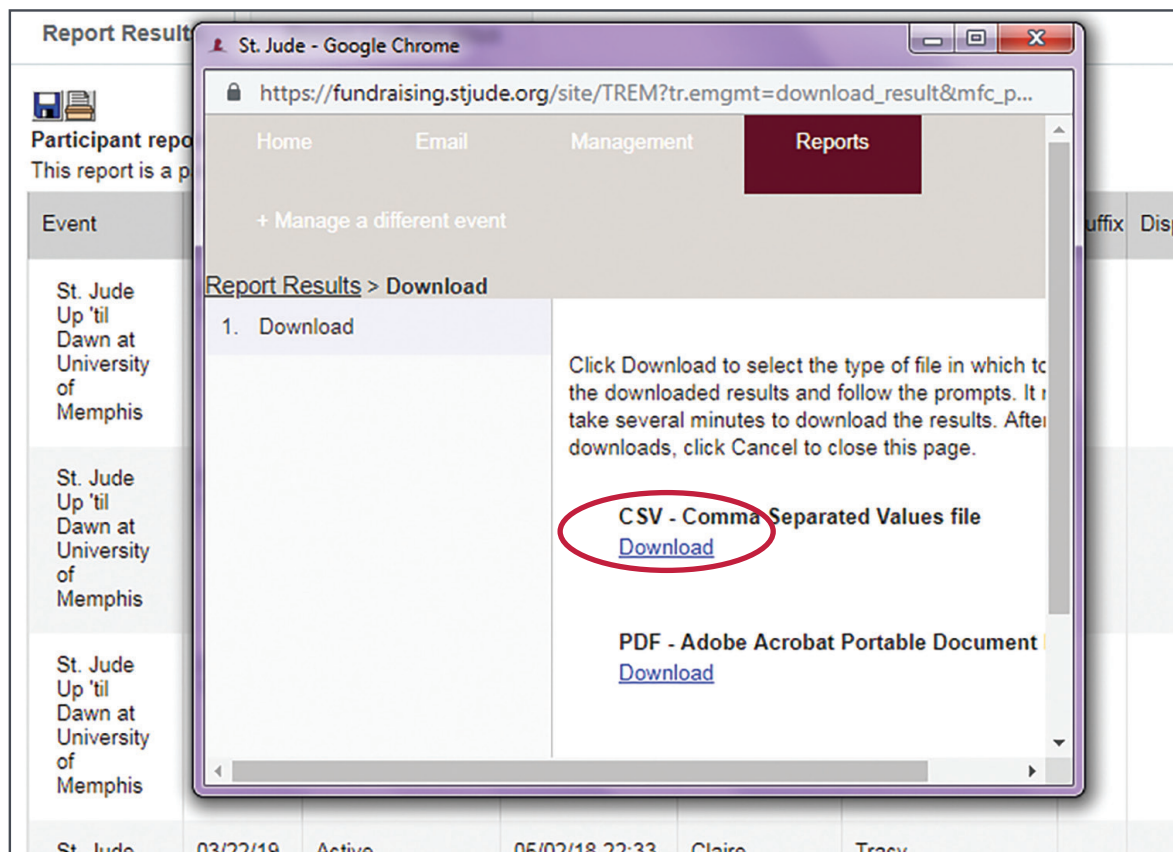
Pull a participant or team report cont.

3. Click **Run Report**.



4. Wait for the report to generate a preview, then click the **Save** icon found underneath the **Report Results** tab. A dialogue box will appear. Click the CSV **Download** link.

Note: You may have to wait a minute before the file will download. Keep clicking the download link until the file begins to download at the bottom of the dialogue box.



5. Click the **Report File** at the bottom of the dialogue box to open the file.



Manage a Student Organization

Add a student organization

1. On your home tab, click on the **Management** tab, then **Manage Companies**.

Related Actions

Manage Participants
Manage Teams
Manage Companies
Record Event Gifts
Upload Files
Search For Gifts
Search For Contacts

2. Next, click on the **Add a new company** tab.

Related Actions

Add a new company

3. On the next page, complete sections 1 and 2.

* 1. Administrative Company Name:

The legal or official name of the company that identifies the Local Company in lists that display to administrators

Enter the full or partial name of an organization and click Find to browse potential matches

Test 1

Find an existing Organization

* 2. Public Company Name:

The name that identifies this company or level on pages and lists that display to site visitors, participants, and donors (May be the same as the Administrative Company Name. To edit the public names of the levels within this company, go to the Company Tree page.)

Test 1

4. Leave section 10 marked as Confirmed, then click **Next**.

10. Participation Status:

Determines if this company has committed sponsorship money and is available for team selections

- ☐ Sponsor Only (Not available for team selections)
☒ Confirmed (Available for team selections and/or as a sponsor)

Next

or

Cancel



Add a student organization cont.

5. On the next two pages, leave all fields blank and hit **Next**.

1. Contact Information:

	Title	First Name	Middle Name	Last Name	Suffix	Professional Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>					
Address 2:	<input type="text"/>					
City	<input type="text"/>					
State/Province	<input type="text"/>					
ZIP code	<input type="text"/>					
Country	<input type="text"/>					
Email	<input type="text"/>					
Phone	<input type="text"/>					
<input type="button" value="Next"/> or <input type="button" value="Cancel"/>						

1. First Name:

2. Last Name:

3. Email address

4. Phone number

or

6. Select **Finish** on the final page.

1. Company Summary:

Shows the details entered to date (Note: You can edit details and sponsorship information as well as manage gift and thermometer from the Company List page that displays after you click Finish.)

Company Name: Test 1

Gift Amount:	Adjust Thermometer:
\$0.00	\$0.00

Company Gifts		
Category	Amount	Notes
Total:	\$0.00	

Team and Individual Participant Gifts		
Company/Team Name	Goal	Amount Achieved
Test 1	\$0.00	\$0.00

2. Company Page URL:

http://fundraising.stjude.org/site/TR?company_id=10218&fr_id=92538&pg=company



Edit/delete a student organization

1. On your home tab, click on the **Management** tab, then **Manage Companies**.

Related Actions
Manage Participants
Manage Teams
Manage Companies
Record Event Gifts
Upload Files
Search For Gifts
Search For Contacts

2. Select **Edit Company** or **Delete Company**.

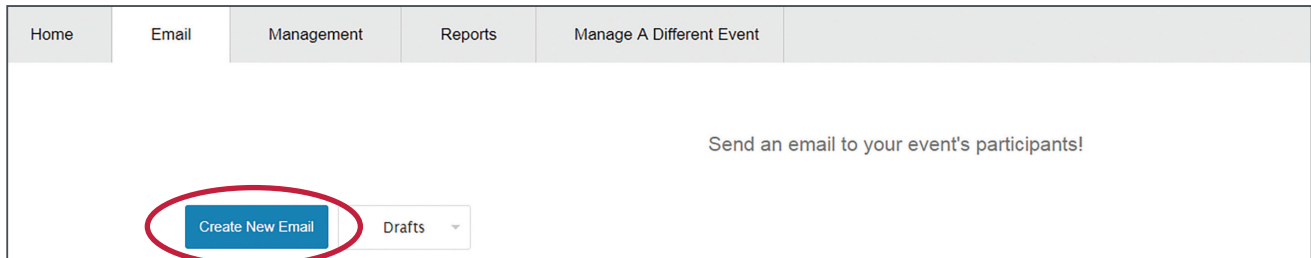
Company Name:	Action
First National Realty First National Realty	<u>Edit Company</u> <u>Manage Company</u> <u>Define Sponsorship Details</u> <u>Delete Company</u>



Send an Email

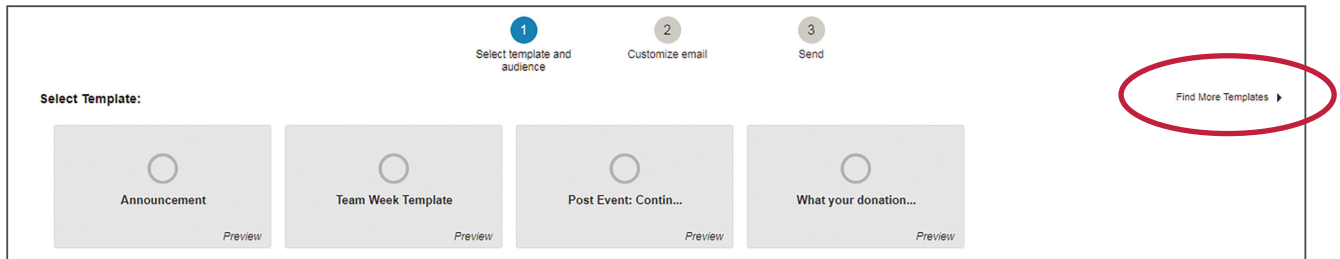
Send emails to a participant

1. Click the **Email** tab, and then click **Create New Email**.



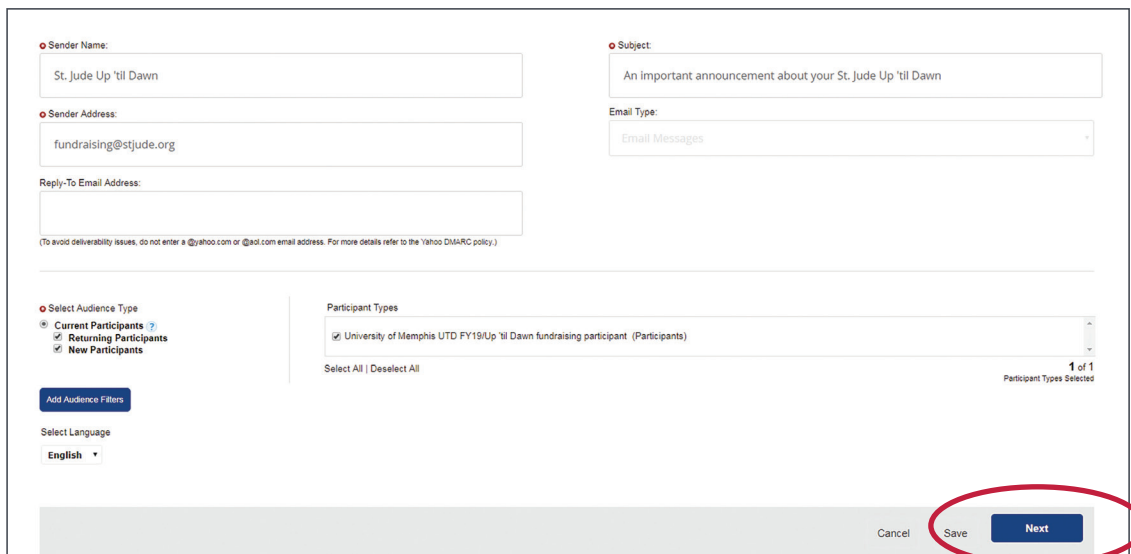
The screenshot shows a navigation bar with tabs: Home, Email, Management, Reports, and Manage A Different Event. Below the tabs, the text "Send an email to your event's participants!" is displayed. A button labeled "Create New Email" is circled in red, next to a "Drafts" dropdown menu.

2. Click **Find More Templates** to view all email options.



The screenshot shows a "Select Template:" section with four template cards: "Announcement", "Team Week Template", "Post Event: Contin...", and "What your donation...". Each card has a "Preview" link. Above the cards are three numbered steps: 1. Select template and audience, 2. Customize email, and 3. Send. A "Find More Templates" link with a right arrow is circled in red on the right side.

3. **Identify the Email Template** that best fits your needs by clicking **Preview** to see the content of each template. Customize the subject, sender and response email as needed, and click **Next**.



The screenshot shows the email customization interface. It includes fields for "Sender Name" (St. Jude Up 'till Dawn), "Sender Address" (fundraising@stjude.org), "Reply-To Email Address", "Subject" (An important announcement about your St. Jude Up 'till Dawn), and "Email Type" (Email Messages). Below these are "Select Audience Type" options (Current Participants, Returning Participants, New Participants) and a "Participant Types" list with "University of Memphis UTD FY19/Up 'till Dawn fundraising participant (Participants)" selected. At the bottom, there are "Cancel", "Save", and "Next" buttons, with the "Next" button circled in red.



Send emails to a participant cont.

4. Use the **Edit Block** buttons to edit the section content and customize the template to your school. **Preview** your message, then click **Next** when your content is ready to be sent.

Subject: An important announcement about your St. Jude Up 'til Dawn

1 Select template and audience 2 Customize email 3 Send

Enables you to format the text (e.g., font color, font size) as well as add links and other text. IMPORTANT: Save each block often while editing to avoid losing work.

Wide: Article Edit Block

Announcements & Reminders

Wide: Greeting Edit Block

Hi First Name OR,

Wide: Body Only Edit Block

We are counting down the days to an incredible night that gives hope and healing to the kids of St. Jude!

Wide: Article Edit Block

Event Date: <DATE>
<Announcements>
<Additional Details>

Wide: Article Edit Block

Sincerely,
Your St. Jude Up 'til Dawn Team

Cancel Preview Next

5. Click **Send Test Email**. Enter your email into the dialogue and proof the email sent to your account. If it is ready to be sent, click **Send Now** or schedule it for later using the **Schedule** tool.

Send a test to yourself and a colleague to check your work.

Send Test Email

Confirm Recipients

N/A
Not Calculated ?
[Calculate Audience Size](#)

Send To:
University of Memphis UTD FY19/Up 'til Dawn fundraising participant.

Exclude:
TeamRaiser Coaching Emails Opt-Out: University of Memphis UTD FY19 92538;

Ready to send?

Send Later

Date:
Schedule

Time:
6 00 pm

Time Zone:
Central

Schedule

OR

Send Now

Your email will go into the delivery queue to be sent as soon as possible.

Send

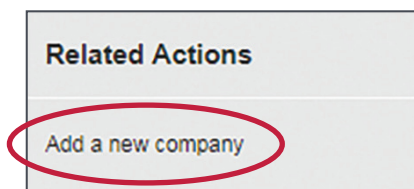


Add Offline Money

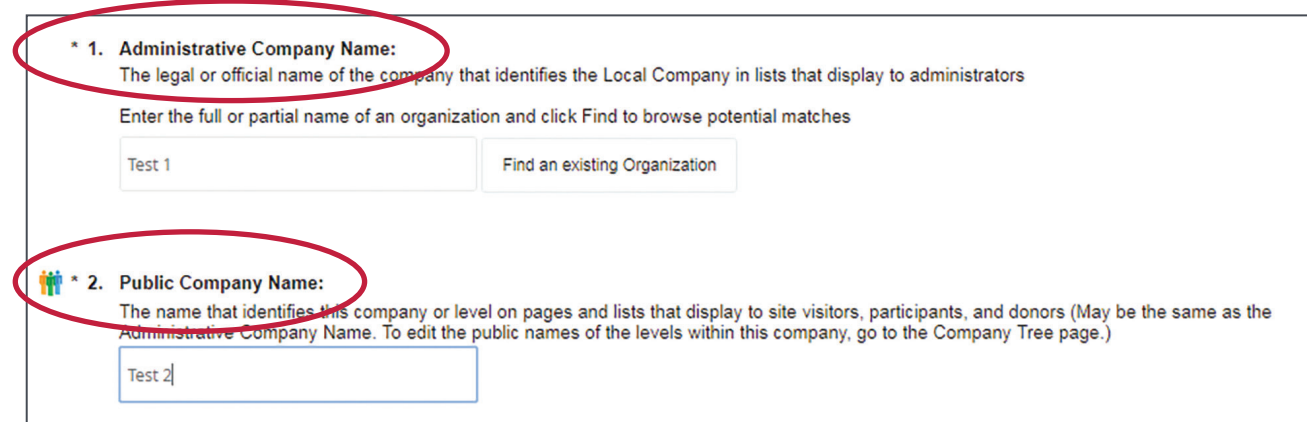
1. On your home tab, click the **Management** tab, then **Manage Companies**.



2. Next, click on the **Add a new company** tab.



3. On the next page, you only need to complete sections 1 and 2. Be sure to add each sponsorship and side event individually. Do not add lump sums of collective sponsorships or side events.

A screenshot of a form for adding a new company. The form has two main sections, both circled in red. Section 1 is titled '* 1. Administrative Company Name:' and includes a description: 'The legal or official name of the company that identifies the Local Company in lists that display to administrators'. Below this is a text input field containing 'Test 1' and a button labeled 'Find an existing Organization'. Section 2 is titled '* 2. Public Company Name:' and includes a description: 'The name that identifies this company or level on pages and lists that display to site visitors, participants, and donors (May be the same as the Administrative Company Name. To edit the public names of the levels within this company, go to the Company Tree page.)'. Below this is a text input field containing 'Test 2'.

Add offline money cont.

4. Select the Sponsor option, then hit **Next**.

10. Participation Status:
Determines if this company has committed sponsorship money and is available for team selections

☒ **Sponsor Only (Not available for team selections)**
☐ **Confirmed (Available for team selections and/or as a sponsor)**

Next or Cancel

5. On the next two pages, leave fields blank and hit **Next**.

1. Contact Information:

Name: Title First Name Middle Name Last Name Suffix Professional Suffix

Address

Address 2:

City

State/Province

ZIP code

Country

Email

Phone

Next or Cancel

1. First Name:

2. Last Name:

3. Email address

4. Phone number

Next or Cancel

6. Select **Finish** on the final page.

1. Company Summary:
Shows the details entered to date (Note: You can edit details and sponsorship information as well as manage gift and thermometer from the Company List page that displays after you click Finish.)

Company Name: Test 2

Gift Amount: \$0.00 Adjust Thermometer: \$0.00

Company Gifts		
Category	Amount	Notes
Total:	\$0.00	

Team and Individual Participant Gifts		
Company/Team Name	Goal	Amount Achieved
Test 2	\$0.00	\$0.00

2. Company Page URL:
http://fundraising.stjude.org/site/TR?company_id=10219&fr_id=92538&pg=company

Finish



Add offline money cont.

7. Once the sponsorship or side event has been added, select **Manage Company**.

Company Name:	Action
First National Realty First National Realty	Edit Company Manage Company Define Sponsorship Details Delete Company

8. Then, select **Add a New Gift**.

Related Actions

Add a new gift

9. Select **Sponsorship** or **Other**, add the gift amount, then add any notes. To complete, select **Finish**.

1. Gift Category:
Identifies the type of gift received

*** 2. Gift Amount:**
Defines the monetary amount of the gift (Note: To keep this amount from displaying in the fundraising thermometer, use Edit Thermometer Amount on the previous page to remove it.)

3. Notes:
Provides details about the gift that other administrators might find helpful (for example, Amount will be removed from fundraising thermometer total)

or





St. Jude Children's Research Hospital®

Finding cures. Saving children.

ALSAC • DANNY THOMAS, FOUNDER

