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

Event Management Center TeamRaiser Tutorials

St. Jude Children's Research Hospital
Finding cures. Saving children.
ALSAC • DANNY THOMAS, FOUNDER

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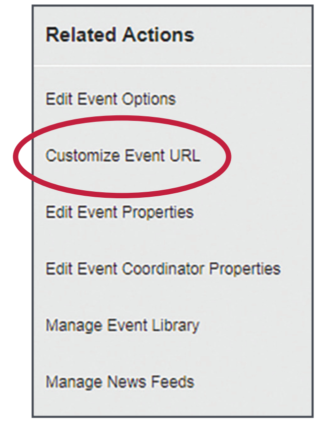
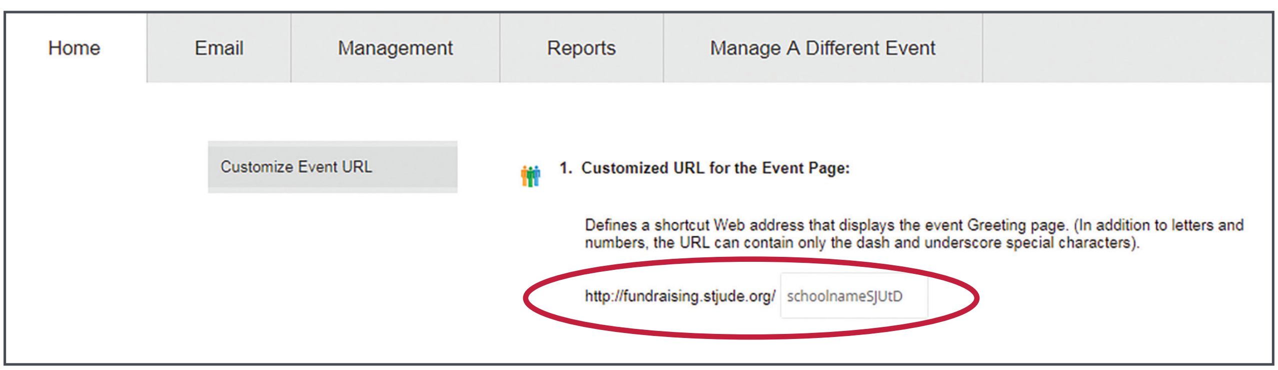
Edit Event Details

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.

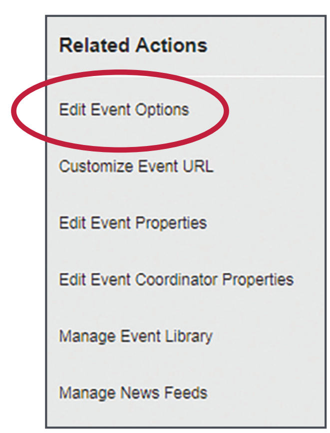


2. Using the editable text box, write your **School Name Followed by SJUtD (One Word)**, then click **Finish** to update that link. http://fundraising.stjude.org/schoolnameSJUtD will be your new vanity URL link.



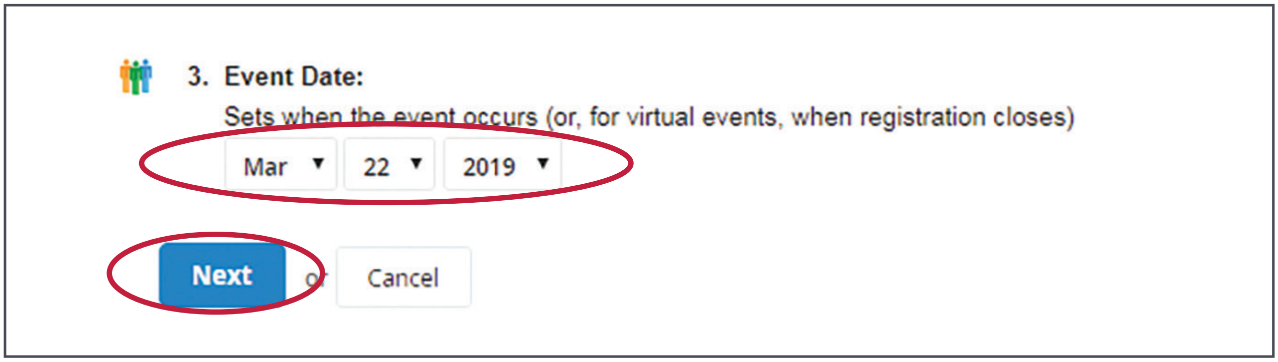
Edit your event date

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



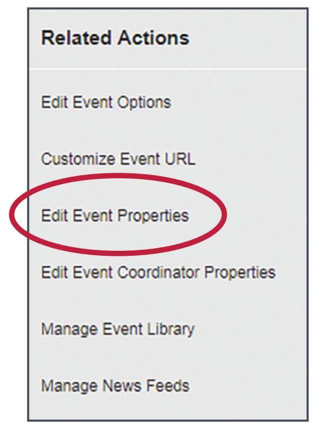
Edit your event date cont.

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.

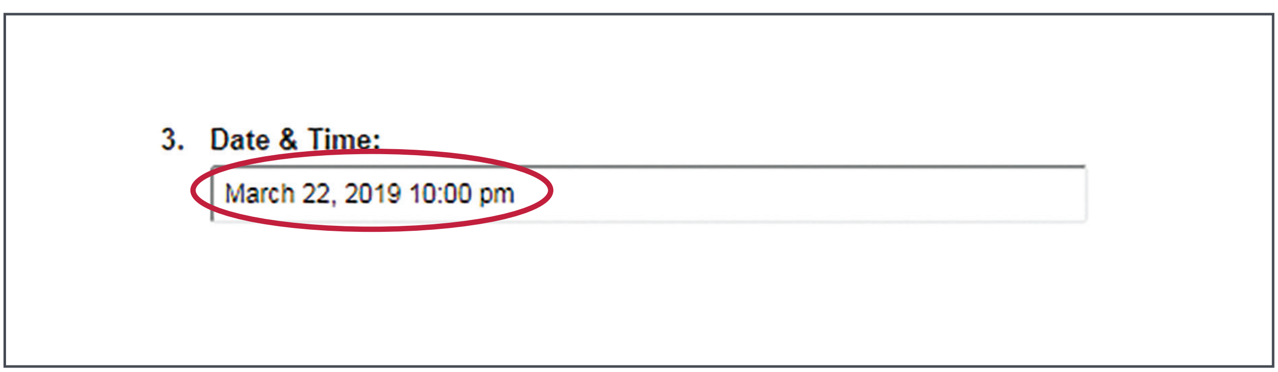


You will also have to change the date in the event page properties to update the date shown on your school's event page.

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

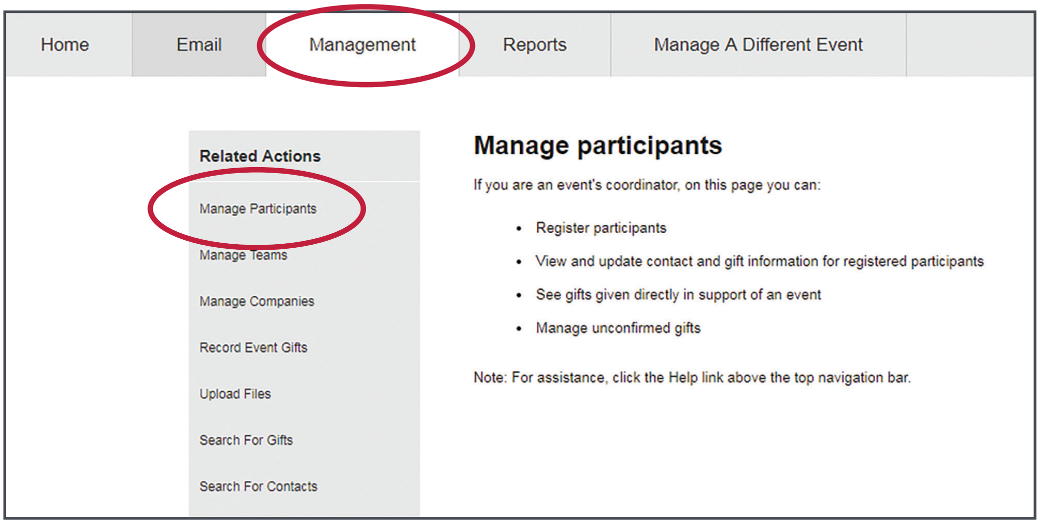


4. Update the date under **Date & Time**. You may also add a registration time here, if needed. Click **Finish** when complete.

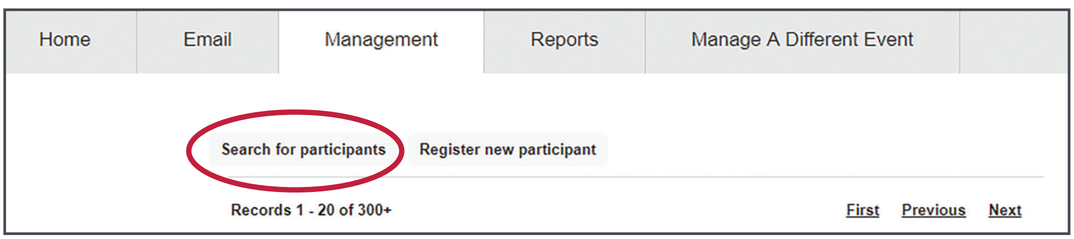


Manage a Participant

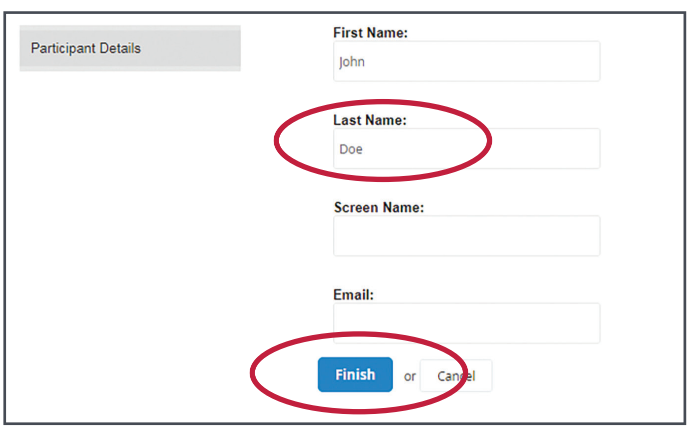
1. On your home tab, click the **Management** tab, and then click **Manage Participants**.



2. Click **Search for participants**.

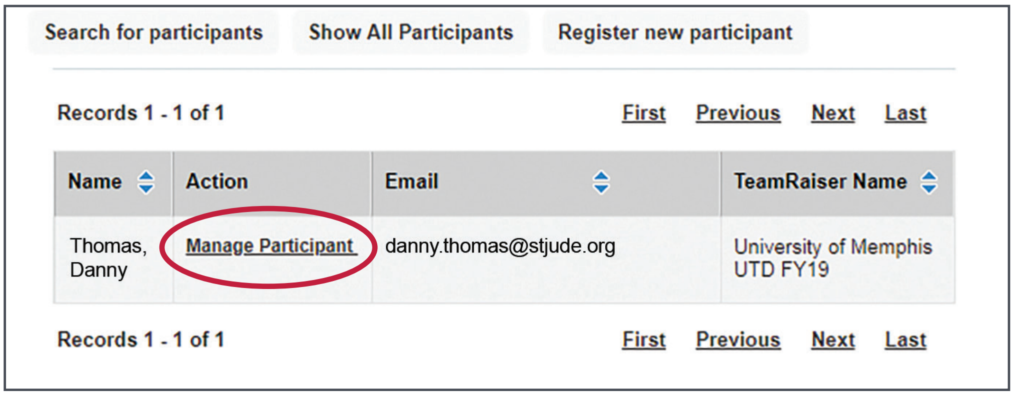


3. Enter the participant's name or email then click **Finish** to search for the participant.



View participant gifts & status

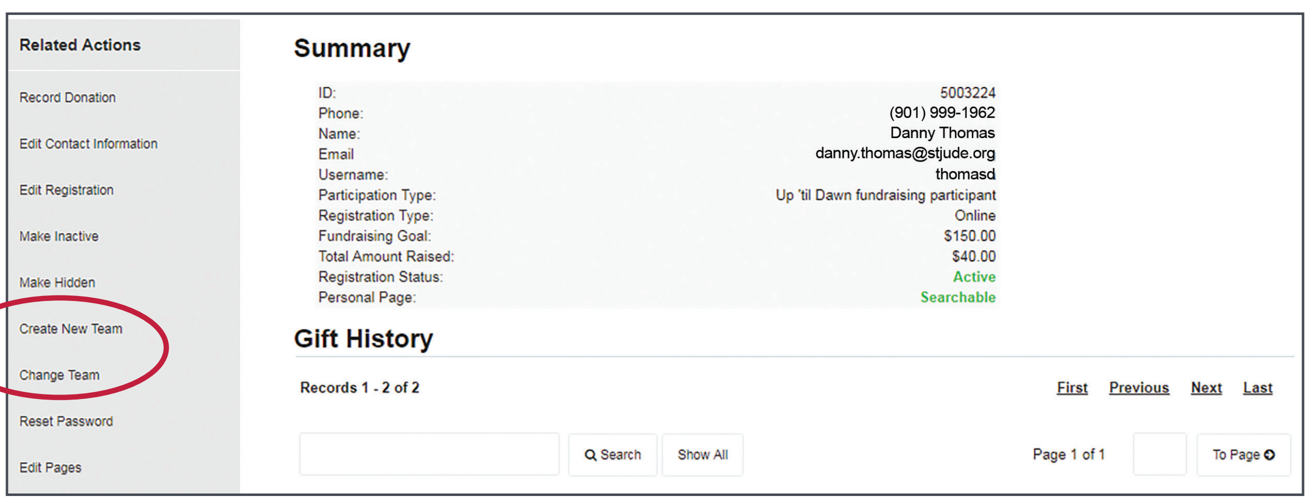
1. Click the **Manage Participant** link next to the participant you'd like to view.



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

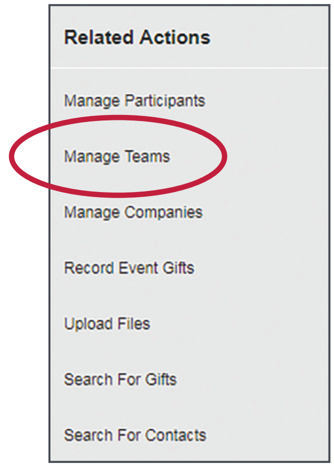
1. To move the participant to an existing team, click **Change Team** and then click **Select** next to the team name you would like to move them to. When prompted, click **Finish** to complete the move.
2. To move this person to a team that does not yet exist, click **Create New Team**. You will be 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**.



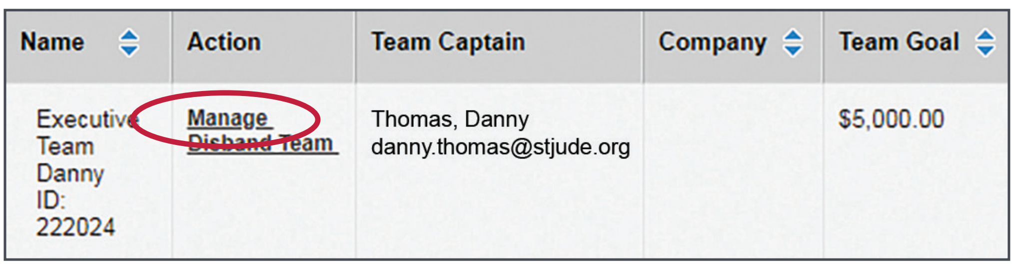
Manage a Team

View team roster

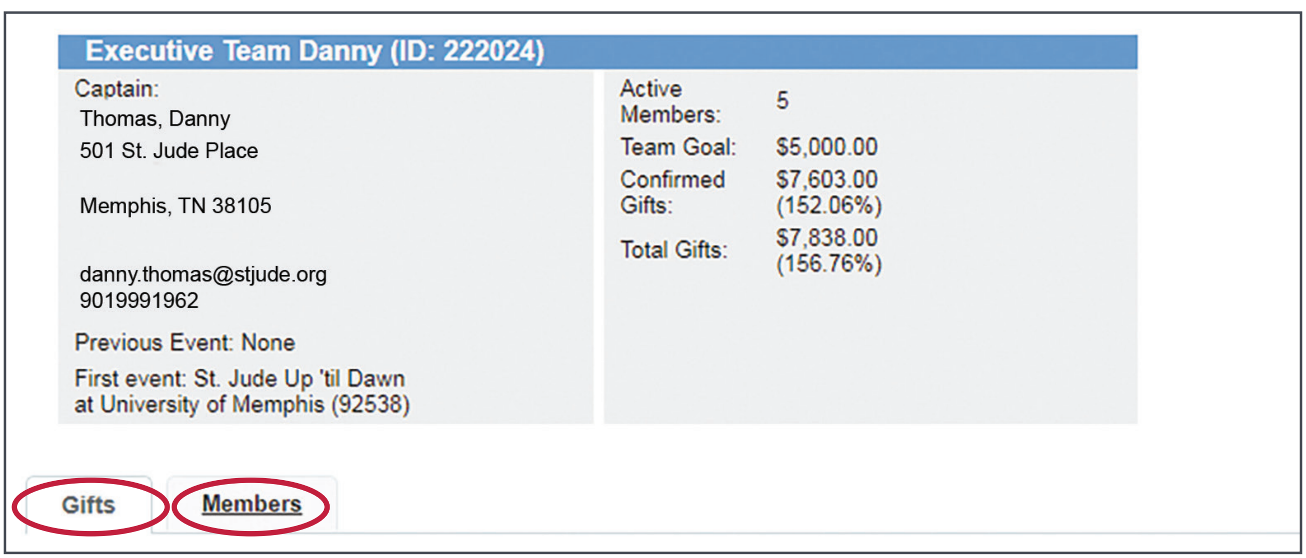
1. On your home tab, click on the **Management** tab, then **Manage Teams**.



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



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.



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

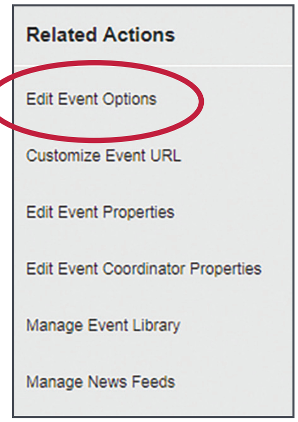
2. Then, click **Promote to Captain** on the right hand side. Reminder: you must promote a new captain before removing the prior captain.

Related Actions

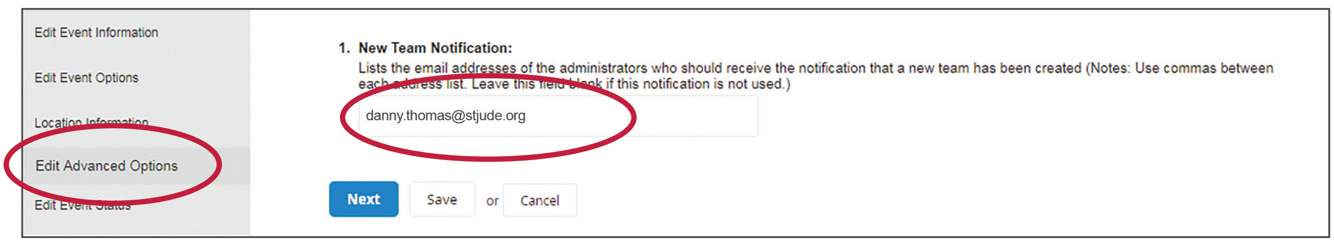
- Record Donation
- Edit Contact Information
- Edit Registration
- Make Inactive
- Remove From All Teams
- Make Hidden
- Create New Team
- Change Team
- Promote to Captain
- Promote to Co-Captain
- Reset Password
- Edit Pages

Set new team alerts

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

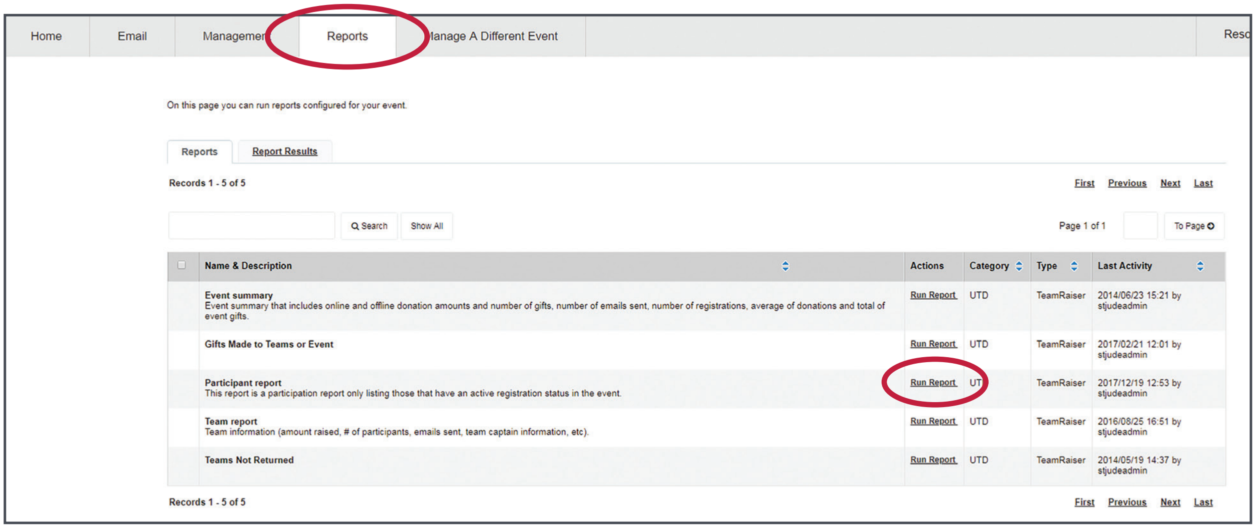


2. Next, click **Edit Advanced Options** and then **Add the Emails** of desired recipients to receive alerts in the editable field. Use a comma or semicolon to add multiple emails. Click **Next**, and then **Finish** on the subsequent page.

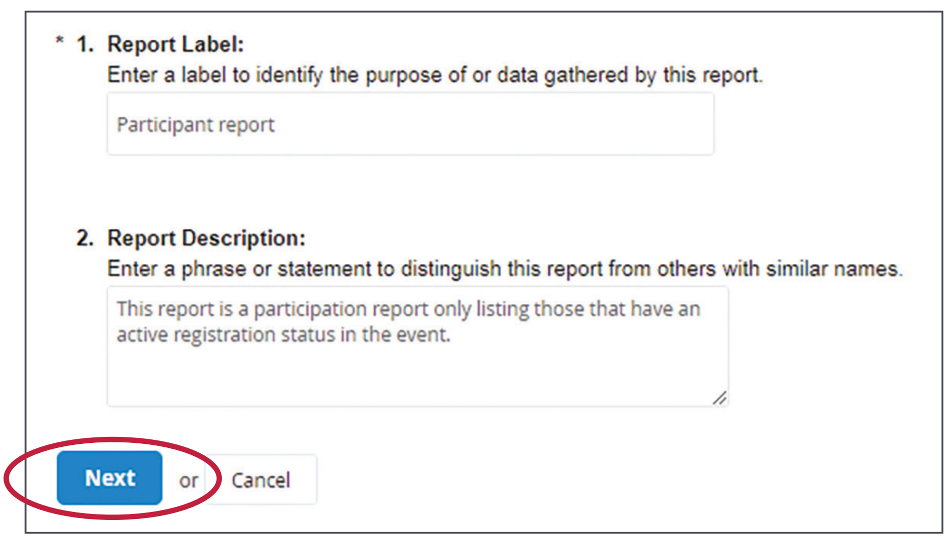


Pull a Participant or Team Report

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.

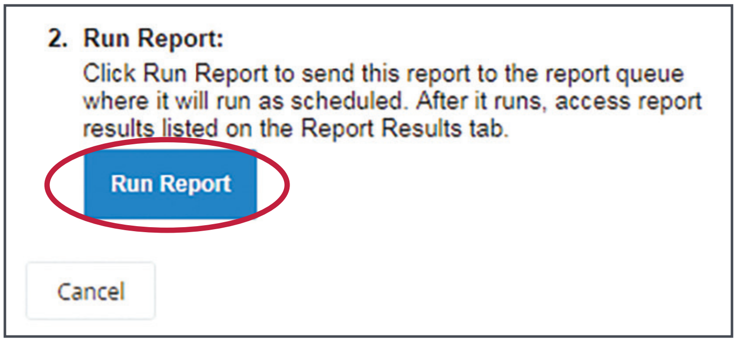


2. Click **Next**.



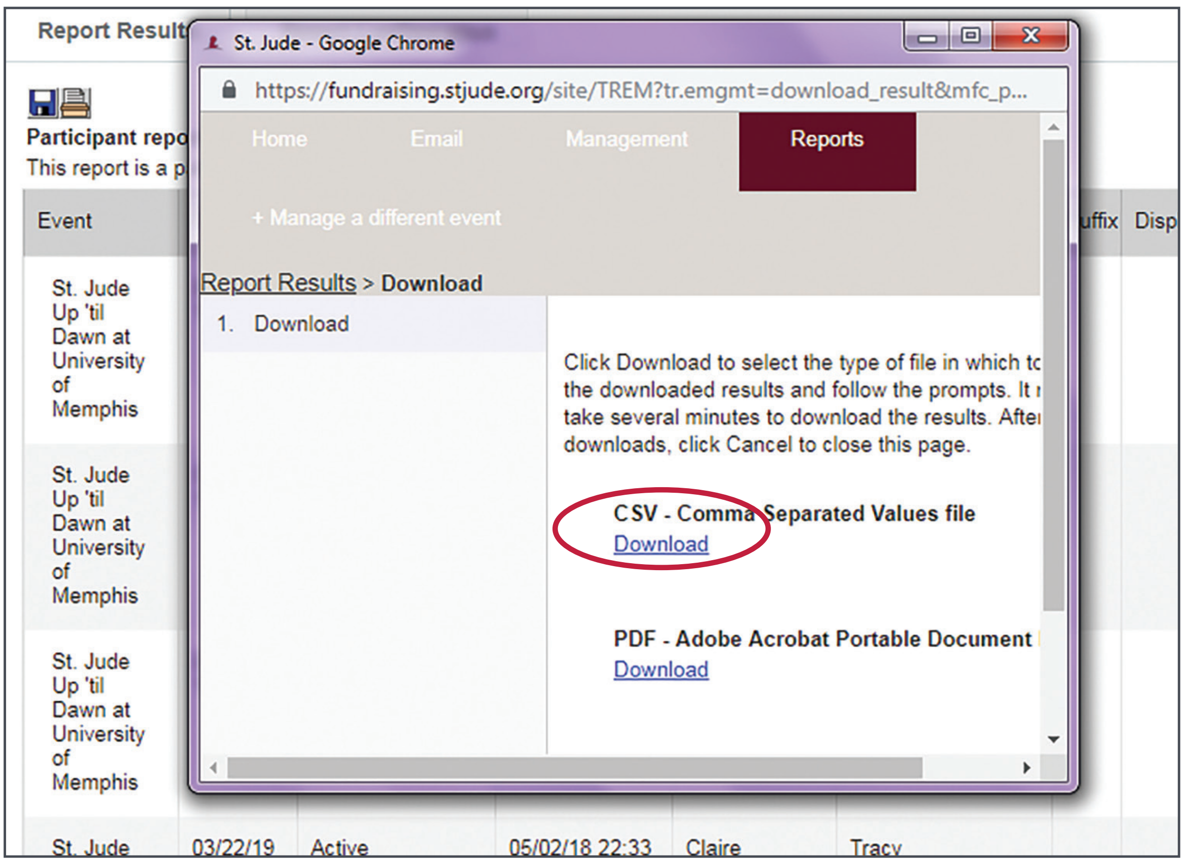
Pull a participant or team report cont.

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.

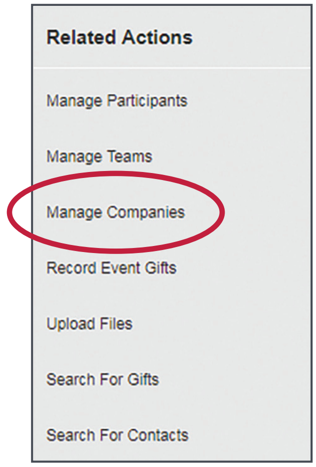
Note: You may have to wait a minute before the file will download. Keep clicking the download link until the file begins to download at the bottom of the dialogue box.



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

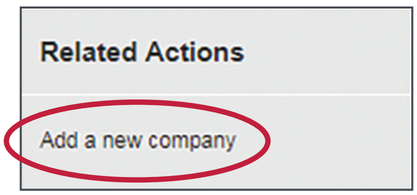
Manage a Student Organization

Add a student organization

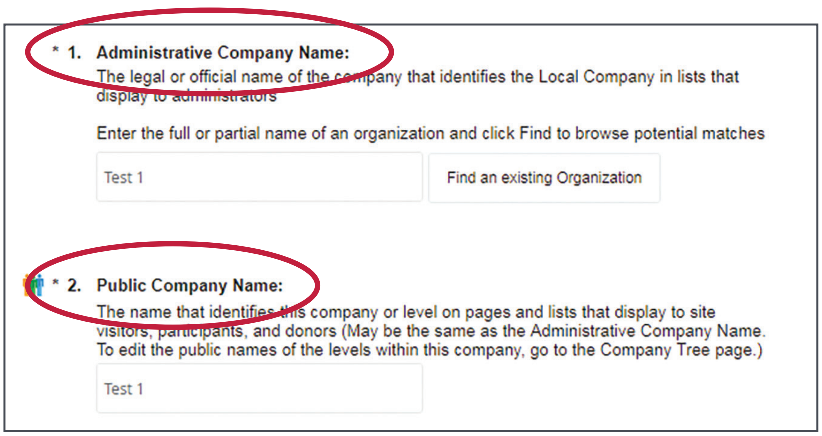


1. On your home tab, click on the **Management** tab, then **Manage Companies**.

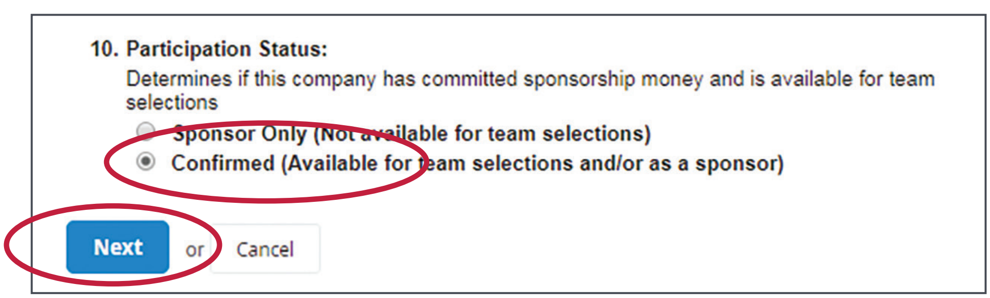
2. Next, click on the **Add a new company** tab.



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

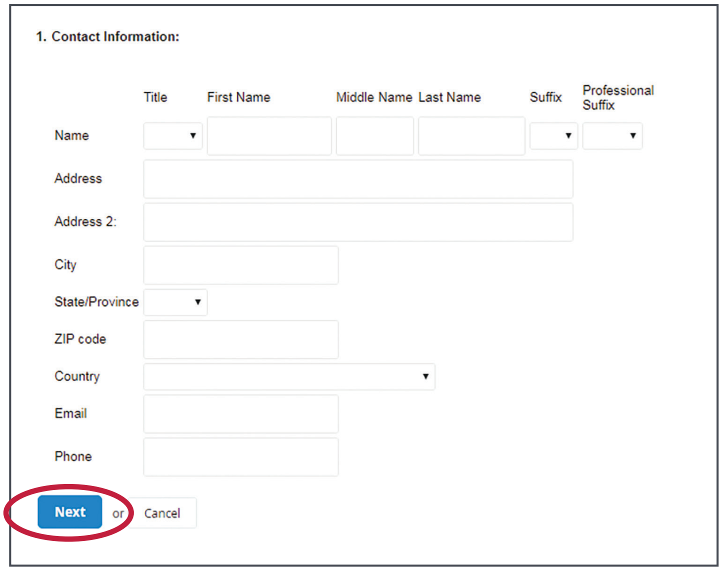


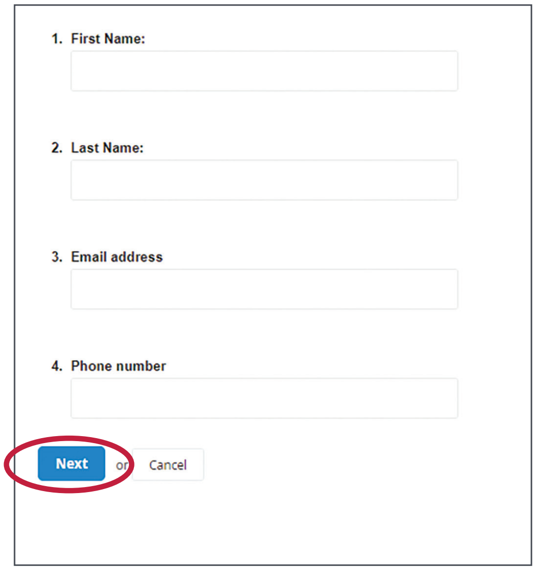
4. Leave section 10 marked as Confirmed, then click **Next**.



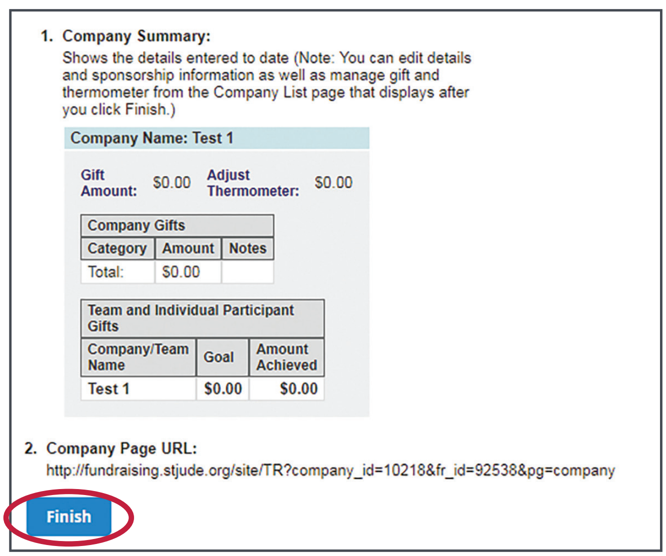
Add a student organization cont.

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



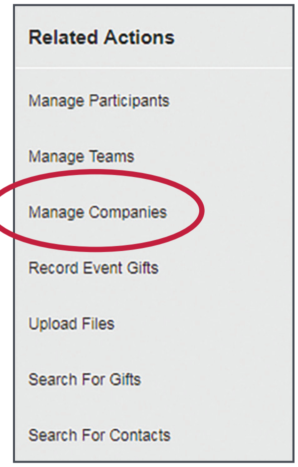


6. Select **Finish** on the final page.

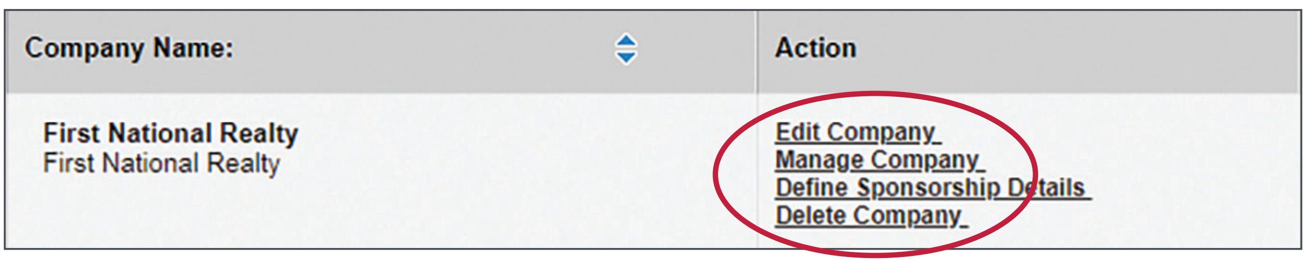


Edit/delete a student organization

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



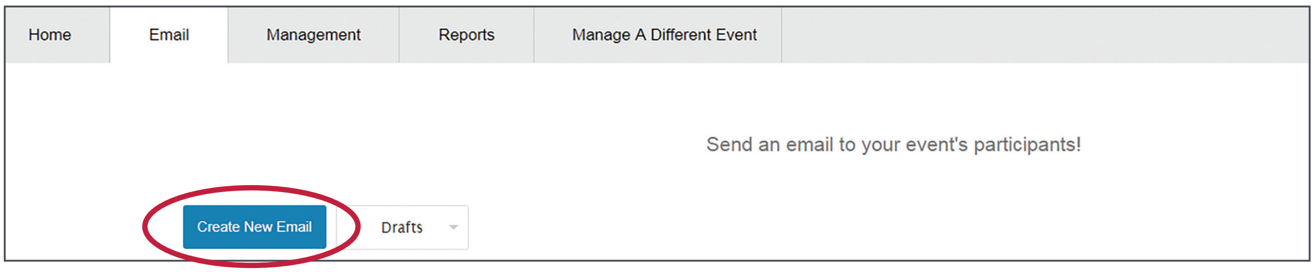
2. Select **Edit Company** or **Delete Company**.



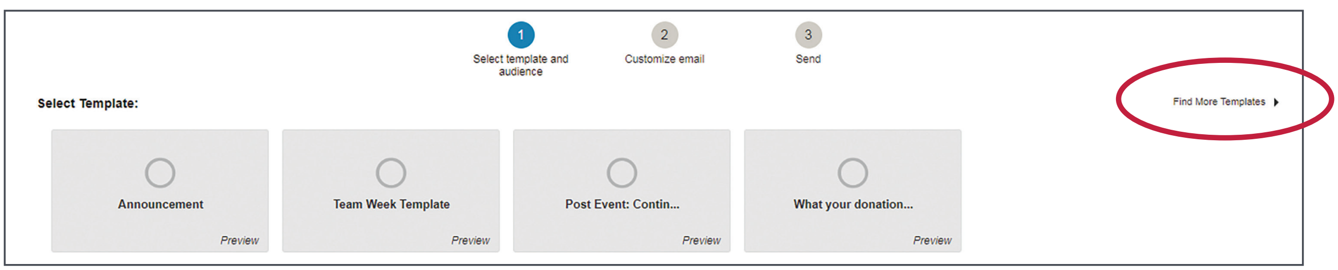
Send an Email

Send emails to a participant

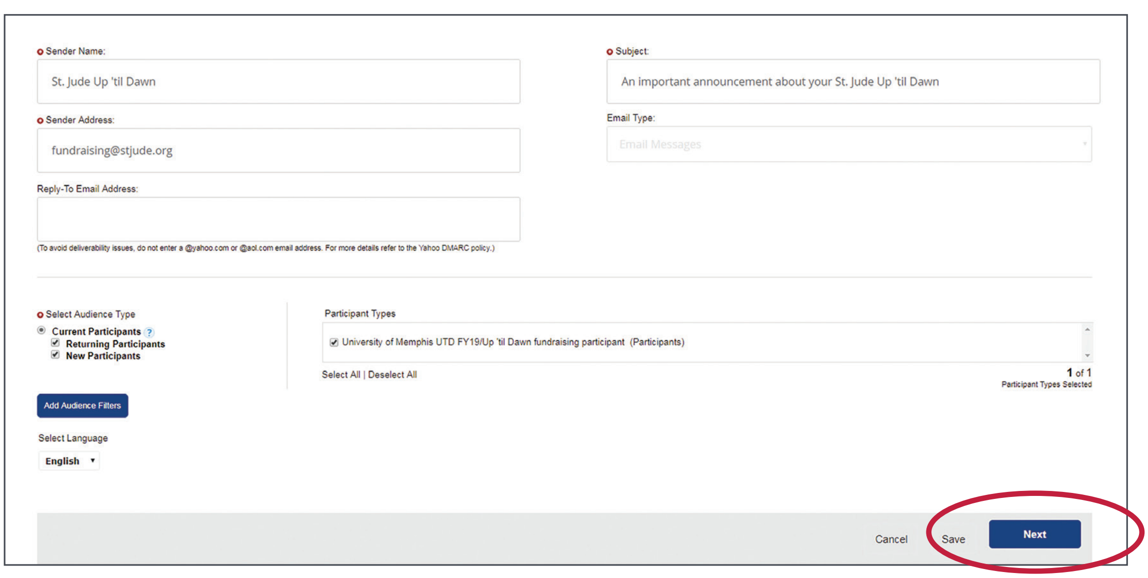
1. Click the **Email** tab, and then click **Create New Email**.



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

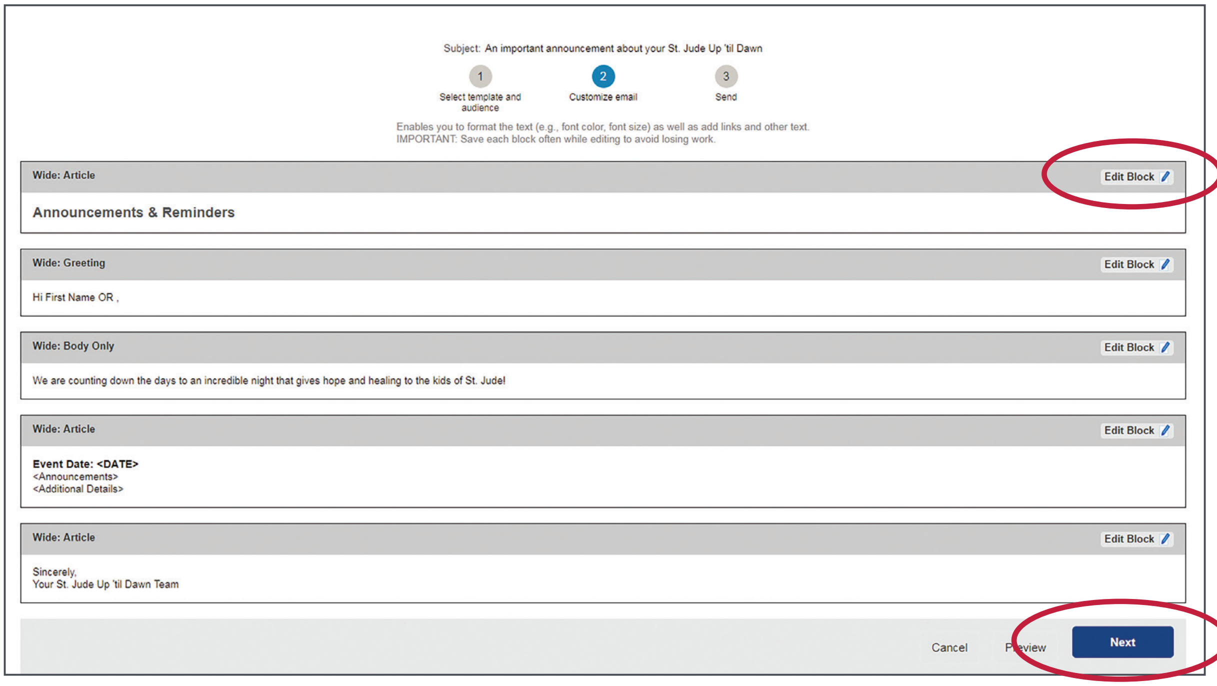


3. **Identify the Email Template** that best fits your needs by clicking **Preview** to see the content of each template. Customize the subject, sender and response email as needed, and click **Next**.

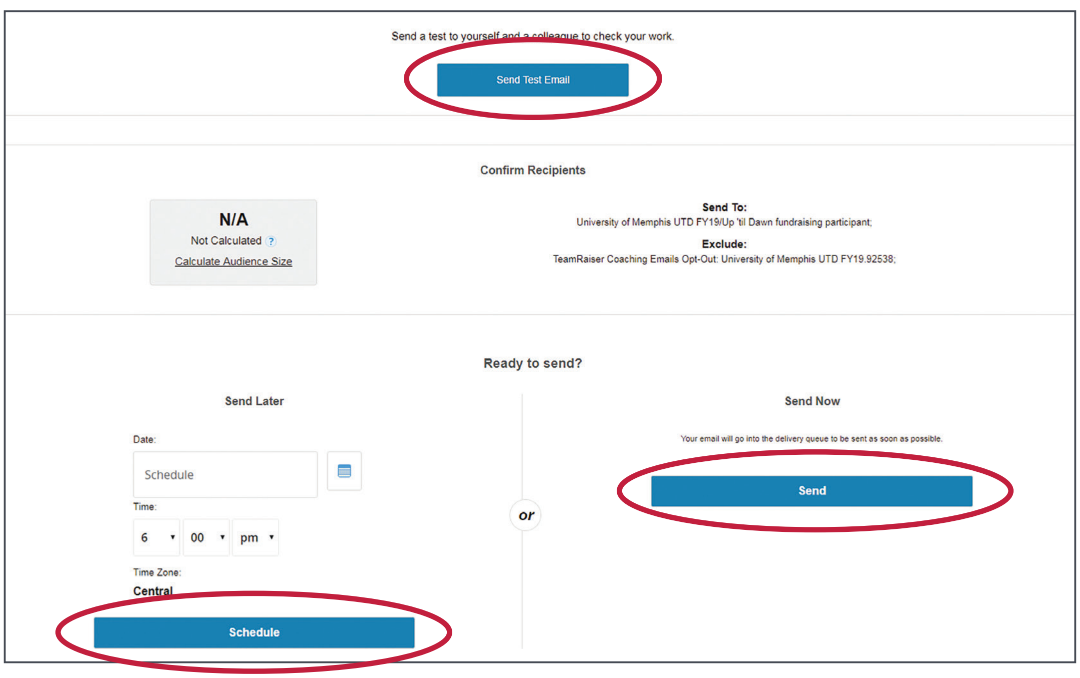


Send emails to a participant cont.

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.

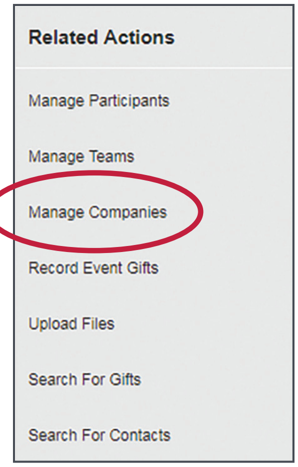


5. Click **Send Test Email**. Enter your email into the dialogue and proof the email sent to your account. If it is ready to be sent, click **Send Now** or schedule it for later using the **Schedule** tool.

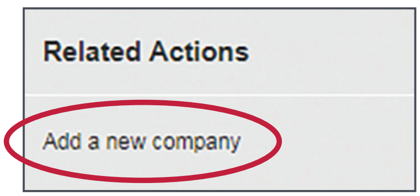


Add Offline Money

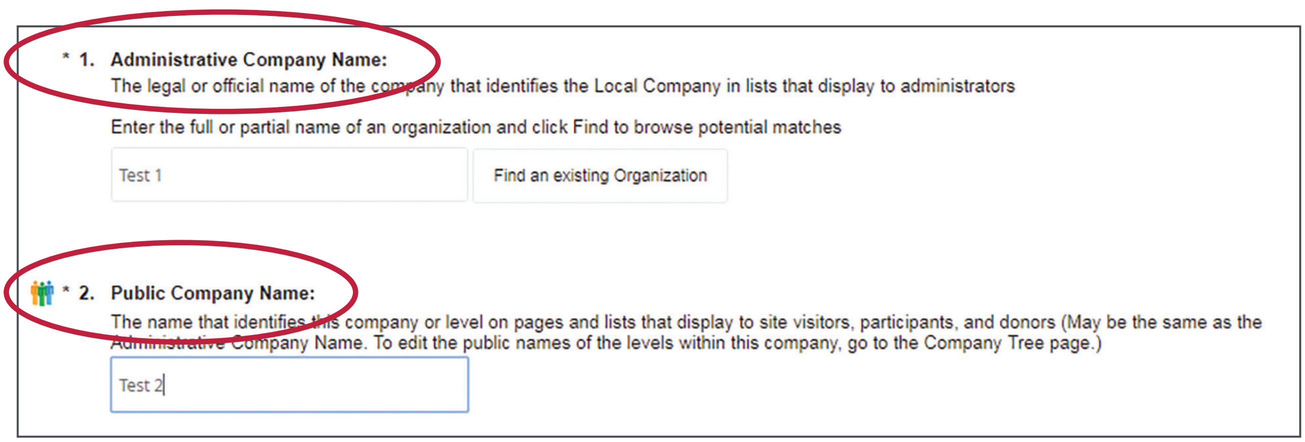
1. On your home tab, click the **Management** tab, then **Manage Companies**.



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



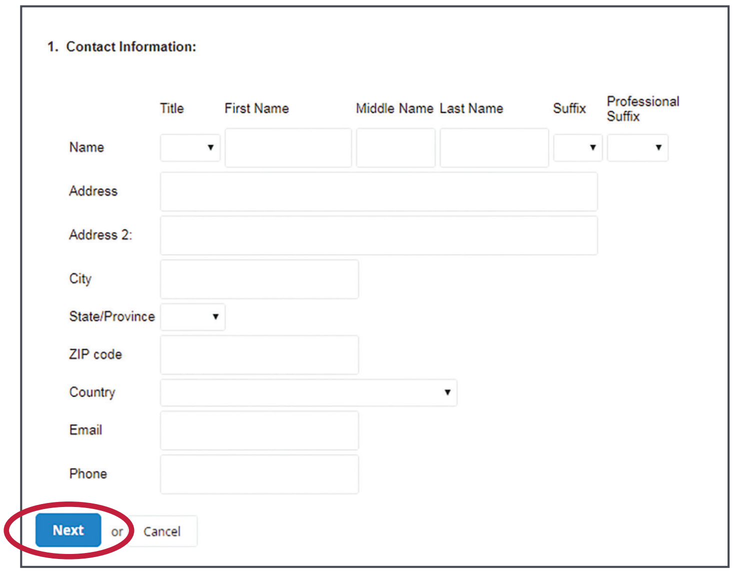
3. On the next page, you only need to complete sections 1 and 2. Be sure to add each sponsorship and side event individually. Do not add lump sums of collective sponsorships or side events.

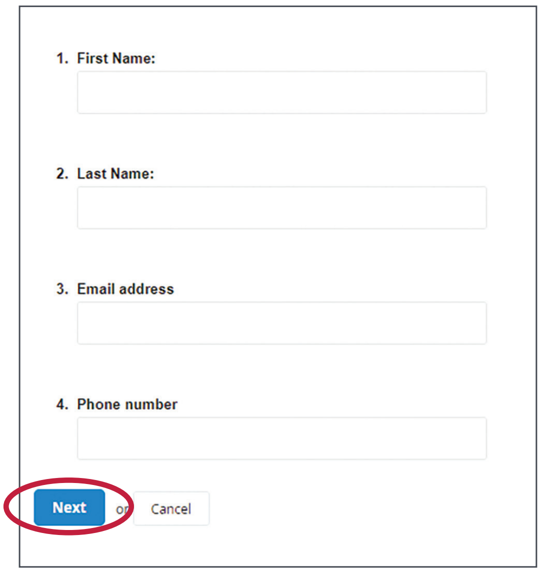


Add offline money cont.

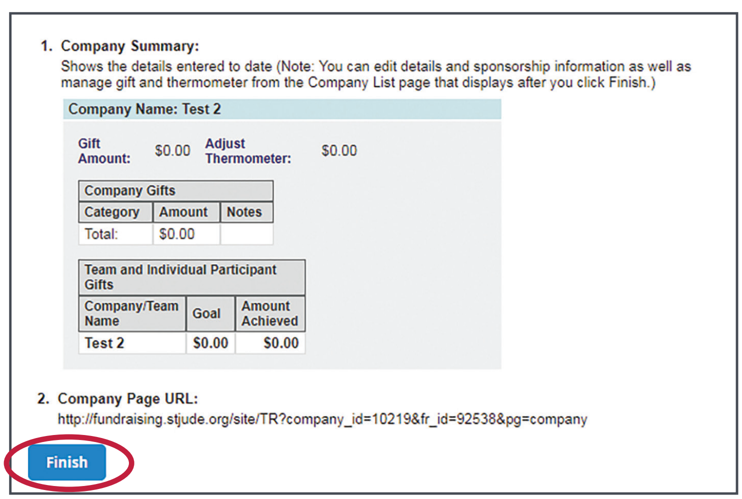
4. Select the Sponsor option, then hit **Next**.

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





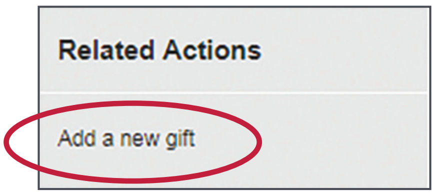
6. Select **Finish** on the final page.



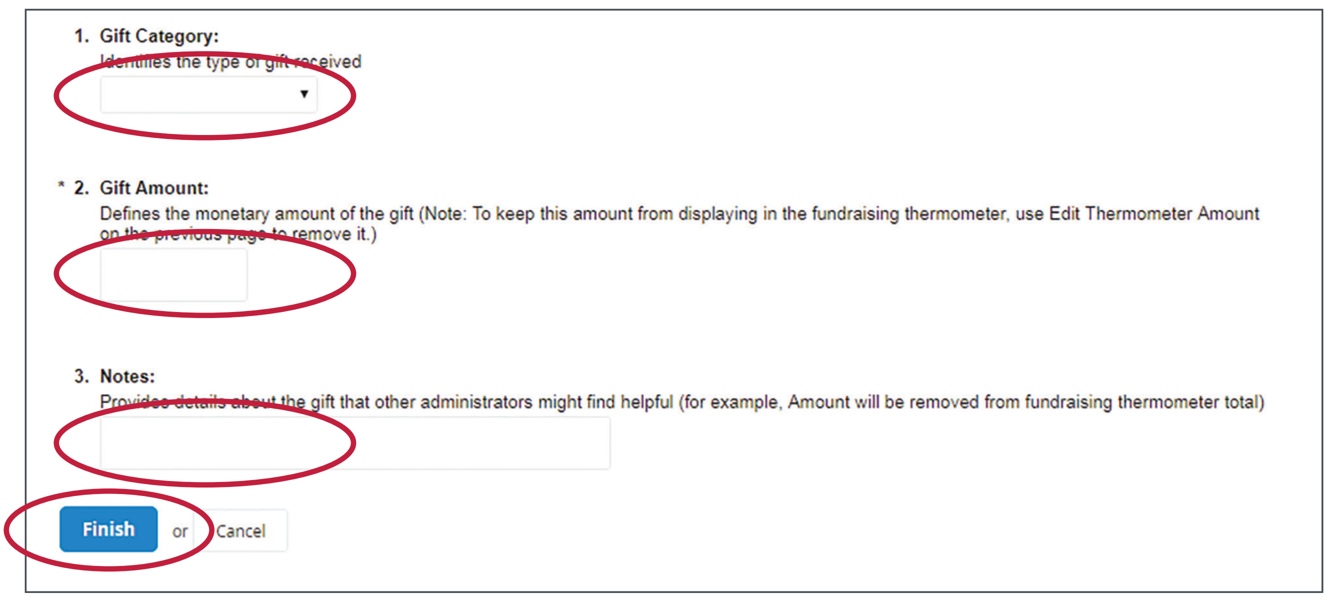
Add offline money cont.

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

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



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

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