WebCampaigns

Administration Console
User Guide

Last Updated: Tuesday, March 01, 2005

Overview

The Administrative Console provides user-friendly event setup and management capabilities. The console simplifies processes for event creation, setup and publishing turning it into a workflow that can be managed by one or several administrators.

The console is organized into information tabs similar to the WebCampaigns Participant Application. The tabs are:

- Home
- Configuration
- Event
- Relationships
- Reports
- Data Entry
- Data Export

Login to the Console

Login to the administration console using the *organizationID*, *username*, and *password* provided by Campagne Associates or your Administrator.

Getting Started

When logging into the console, you are directed to the Home Page. This page is the repository for all things WebCampaigns – items on this page include FAQs/How to, Release Notes, Health Report and support information. It is updated on a regular basis.

Before any events can be created, configuration settings must be completed. Click on the Configuration tab to begin entering these settings.

Configuration

The Configuration tab is comprised of all organization and administrator setup tasks. This section of the Administration Console allows administrators to enter and modify organization information, set up tax receipting, enter payment gateway information, configure the default 'look and feel' settings of their registration website and setup additional administrators.

The configuration tab is divided into two subgroups: *Organization Setup* and *Administrators*.

Organization Setup

The organization setup section controls all settings at the organization level. These settings are of a global nature and are not specific to a particular event. This section is divided into the following groups:

- Organization Summary
- Electronic Payments
- Tax Receipting
- Default User Interface
- Title Setting
- Monthly Donations
- Privacy Policy

Checklist- Organization Summary

Organization Information

1. Organization Name
2. Address
3. Phone Number
4. Web Site
5. Description

Contact Information - *required for Management, Technical and Billing Contacts*

1. Name
2. Title
3. Email Address
4. Phone Number
5. Description

Organization Setup:
Organization Summary

All organization and contact information is displayed. Click on the Edit Information link to enter or modify your organization's information. Basic address and phone number information is entered here. To enter the name of your Organization (which may be entered in both English and French), click the Edit Organization Name link.

Contact information is divided into three specific areas:

1. Management – this is the main contact person for Campagne Associates. This person is responsible for high level decisions.
2. Technical – any technical issues regarding the registration website will be addressed to this person
3. Billing – any issues related to billing will be addressed to this person

Organization Setup: Electronic Payments

Electronic payment systems are used to process credit card payments for registration fees and donations online.

Checklist- Electronic Payments

1. Internet merchant account
2. Provider Name
3. Account ID
4. Password (optional depending on provider)
5. Credit cards accepted

Definition: Internet Merchant Account

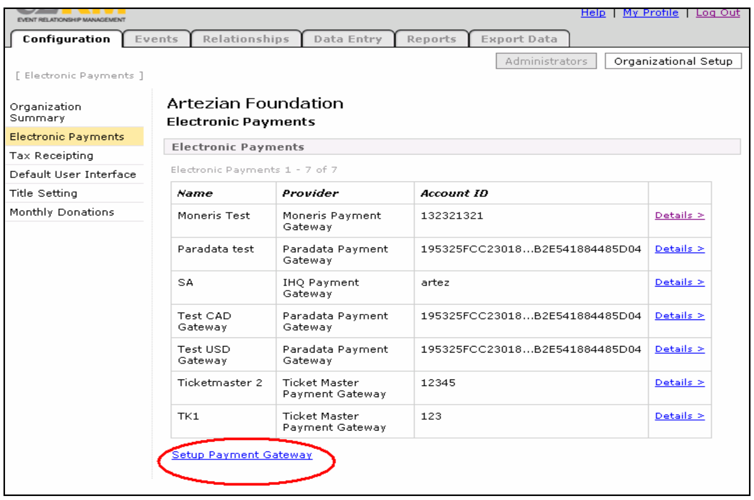
An internet merchant account is required to process any payments online. Please contact the supported payment providers for more information on internet merchant accounts.

Currently, the WebCampaigns System supports the following payment provider:

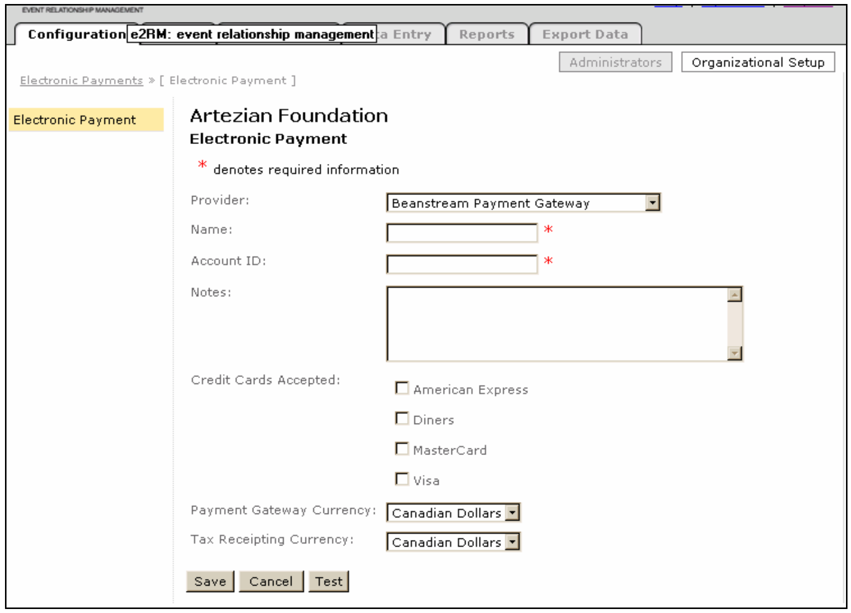
- IATS TicketMaster

To add a new electronic payment system:

1. Click the ‘Setup Payment Gateway’ link on the Electronic Payments page
2. Select the provider
3. Enter a name for the payment system. This name will be used to specify the payment system to use for each event created.
4. Enter the account id specified by the provider
5. Enter the password specified by the provider if applicable
6. Enter any notes
7. Select the credit cards that will be accepted. The WebCampaigns System currently supports VISA, Diners, Discover, MasterCard and AMEX
8. Select the gateway currency
9. Select the tax receipting currency
10. Click ‘Save’



The ‘Setup Payment Gateway’ link is located at the bottom of the Electronic Payments page



Follow the steps listed above to setup your payment gateway.

Once the payment system has been saved, the settings can be viewed and edited by clicking on the *Details* link on the Electronic Payments page.

Note: if your organization has more than 1 merchant account, you will be able specify which account to use for each event you create

Organization Setup:
Tax Receipting

The tax receipting page allows administrators to view and edit tax receipt settings, maintain and add new tax receipt blocks, and create and edit tax receipt templates.

Checklist- Tax Receipting

Tax Receipt Settings

1. Charitable registration number
2. Tax receipt number prefix
   Tax receipt number suffix
3. Tax receipt number length
4. Leading zeros
5. Minimum donation amount

Tax Receipt Blocks

1. Starting number
2. Ending number

Tax Receipt Templates

1. Charitable registration number
2. Electronic logo
3. Electronic signature

Tax Receipt Settings

All tax receipt settings are displayed here. These settings deal with the general tax receipt information relevant to all tax receipts issued by your organization for any event. To enter settings click on the *Edit Tax Receipt Settings* link. The following information is entered on this page:

- Charitable Registration Number
- Tax Receipt Number Prefix
- Tax Receipt Number Suffix
- Tax Receipt Number Length
- Leading Zeros
- Minimum Donation Amount

Tax Receipt Number Length **is the total number of digits in the tax receipt number including the leading zeros and not including the prefix and the suffix.**

For the examples shown below, the tax receipt number length is 4.

12345 6789 RR0001

www0004ART   www0004ART   www0004ART

Charitable Registration Number   Prefix   Leading Zeros   Suffix

Tax Receipt Blocks

Details regarding blocks of tax receipt numbers are displayed in this section. The starting, ending and current numbers as well as the status of each block of numbers are shown.

Definition: Tax Receipt Block

A tax receipt block is a set of numbers that will be used sequentially on the tax receipts issued by the online system. Numbers within a block must be consecutive, and separate blocks of numbers cannot overlap.

To add a tax receipt block:

1. Click on the *Setup Block of Tax Receipt Numbers* link
2. Enter the starting number
3. Enter the ending number
4. Click submit

Once the block of tax receipt numbers has been added, only 2 settings can be changed - the ending number can be edited, or the block of numbers can be expired. The edit these settings, click on the *details* link. When a tax receipt block reaches the end, it will automatically expire and start using the next of numbers. **Keep your tax receipt blocks up-to-date!**

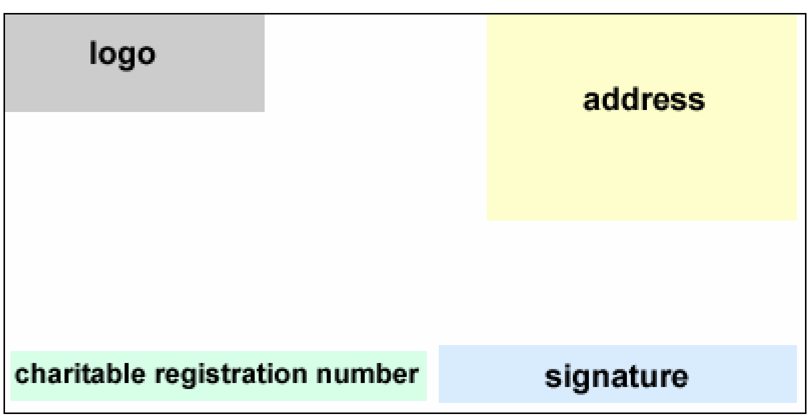
Tax Receipt Templates

This section displays the name, source template used and status of each of the tax receipt templates.

Definition: Tax Receipt Template

A tax receipt template creates the design of the tax receipts that will be issued by the online system. Customized information including your organization's logo, a signature and charitable registration number can be added to a basic predetermined layout.

Generic Tax Receipt - Layout



Setting up a tax receipt template:

1. Click on the link *Setup Tax Receipt Template*
2. Specify a name for your tax receipt template
3. Select a source template (this determines the layout)
4. Enter your charitable registration number (optional)
5. Enter your organization's address (optional)
6. Upload your organization's logo
7. Upload the signature
8. Click submit

The *Details* link allows you to modify any of the tax receipt template settings. The first edit page changes the name and status of the tax receipt template. You can also view the template from this page – click *preview*. To change the customized information, click on the *Build Tax Receipt Template* link - doing this removes the current customized settings. You will need to enter all the information including graphics again.

Organization Setup:

Default User Interface

The default user interface page gives administrators control of how their registration website will look and feel. Elements such as fonts and colours can be customized to tie in with your organization's website to give brand consistency.

Default colours and fonts are provided within the WebCampaigns system, however you can modify these settings to create your organization's own default. These settings are optional – events can be created without modifying them. This sets up the default background colours and font settings for the registration website for all events.

Example: Default User Interface

Your organization's colours are blue and red across all media. Carrying this branding through to all your WebCampaigns events creates consistency and recognition for your end users. Modify default user interface settings to match your colours. When you create events, they will have these settings unless you specify an Event User Interface.

Definition: Font Family

A font family is a set of fonts with a similar look. A variety of users will be browsing your registration website with different computers. Not all of these computers will have the same fonts installed; specifying a font family helps ensure the your registration site will look similar to all users.

Organization Setup:
Title Setting

The title dropdown menu is an organization-wide setting that is setup in the Configuration area and managed at the event level.

PLEASE NOTE – THE TITLE DROPDOWN CANNOT BE ENABLED FOR EVENTS CREATED BEFORE MARCH 19 2004

Tip

Prepare your list with the desired sort order before you login to WebCampaigns in both languages if applicable

To setup the title dropdown menu, please follow these instructions:

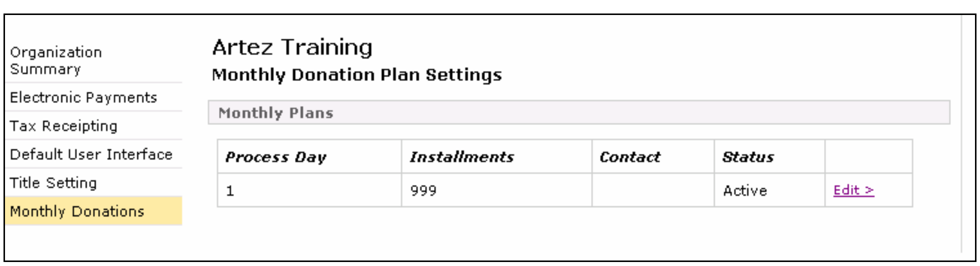
1. Select a language (English or French)
2. Click on the "Title Setting" link under the Configuration Tab
3. Click on the "Setup New Title" link at the bottom of the page
4. Enter a name (this is the display value)
5. Enter a description (optional)
6. Enter an export id (this id will be displayed in the snapshot report and export file)
7. Select the sort order
8. Select display in dropdown option
9. Click Save
10. Repeat for all titles you require

The English and French lists are completely separate from each other. If your events support both languages, you need to setup both lists.

Once your list is configured, you can enable it at the event level.

Organization Setup:
Monthly Donations

This section defines the main organization monthly donation plan. The plan's settings may be modified by clicking on the edit link:



The following settings can be changed:

- Processing day
    - 3 dates are available - 1, 15, or 28 of the month
- Number of Installments
    - Default number is 999

- Status
    - Active or cancelled

Administrator Information – the email you provide will receive all administrative notifications regarding monthly plans including declined transactions and expired cards.

<u>Administrators</u>

The administrators section controls access to the Administration Console itself. Multiple administrators can be setup and given appropriate levels of access to the console.

Administrators:
Administrator Summary

This page list all administrators currently setup and displays their name, username, administrator type and title. To edit an existing administrator's information, click on their name. To setup a new administrator, click on the Setup Administrator link at the bottom of the page.

Checklist- Administrator Summary
For each Administrator you are setting up, you will need:
Username (required)
Password (required)
First Name (required)
Last Name (required)
Job Title
Region/Office
Email address (required)
Phone number
Address Information (optional)

Administrators:
New Administrator

To setup a new administrator:

1. Enter a Username
2. Enter a Password
3. Confirm the password
4. Enter the First Name
5. Enter the Last Name
6. Enter the Job Title
7. Enter the Email Address
8. Enter the Phone Number
9. Enter a description (optional)
10. Click Continue

Follow the steps here to setup a new administrator.

The next step is to set the Administrators Access Rights. Click the details link to select the appropriate Access Controls to define what access this administrator has been assigned.

1. Check all areas that this administrator will have access to
2. Click Save

This brings you back to the Administrators Access Rights page – click the "Finish" button to complete.

Configuration : Summary

In this section, we have explored the Configuration tab and seen that the tasks within it have control over events at a top organization level - these settings are common to all events that are created.

We have learned to setup and maintain your organization name and contact information, enter payment gateway information, create tax receipt templates using your own logo and signature, setup tax receipt number blocks and manage them, and add new administrators.

Event

The event tab encompasses all event management tasks. This section of the administration console allows administrators to create new events, edit existing events and manage all aspects of the event. Event settings include setup of locations, team settings, registration fees, waiver, pledge form, survey questions, email management and content management.

The default page for the event tab is *List Events*. This page lists all events, as well as their date, type and status. From this page, administrators can:

- Create a New Event
- Edit Existing Events

Click on the name of an existing event to edit it.

Click on the 'Setup New Event' link at the bottom of the page or in the left menu to create a new event.

Event:
Setup New Event

New events are created through the use of a wizard. Simply follow the instructions on each screen.

Checklist- Setup New Event

1. Event Type
2. Team and registration fee requirements
3. Template type
4. Languages supported
5. Event Name
6. Event start and end dates
7. Registration start and end dates
8. Payment Gateway

Read through the instruction screen carefully and make sure you have assembled all the required information. Click 'Next>' to start the wizard.

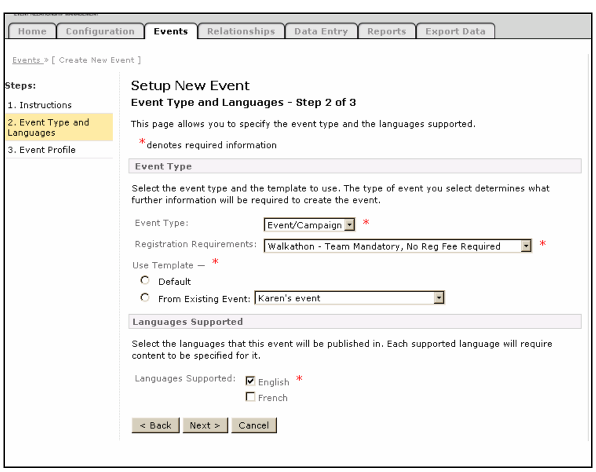
On the following page the Event Type and Languages Supported are specified.

Event Type:

1. Event Type - this list will depend on what your organization has purchased
2. Registration Requirements - team and registration fee settings
3. Template -default or from an existing event previously created by your organization

Languages Supported:

This determines which languages your registration website will be presented in. Currently the system supports English and French.



Please Note: if you specify another language in addition to English you are required to provide all content in that language. The WebCampaigns System only provides default

The next page is Event Profile. This pages allows you to define the general event information, including the event name, and date.

To complete setup, enter the following information:

1. Event Name
2. Fundraising goal
3. Event start date
4. Event end date
5. Registration start date
6. Registration end date
7. Description (optional)
8. Export Event ID
9. Default Country
10. Payment gateway
11. Enable Self Sponsor
12. Issue tax receipt for self sponsor

You can click 'Back' to go to the previous page.

When you have entered the required information click 'Setup Event' to finish!

Definition: Event Start and End Dates

The event start and end dates refer to the dates when the actual event begins and ends .

Definition: Registration Start and End Dates

The registration start and end dates refer the dates when visitors to your registration website can register for your event.

Definition: Export Event ID

The Export Event ID is an ID specified by the administrator that identifies the event in the export file. This will identify the record as part a specific event

Definition: Default Country & Province

The values set here will be the default values displayed in the participant form.

When your new event has been successfully created, a confirmation page with the event details will be displayed. It is divided into 2 areas:

General Information

- Event name
- Event Type
- Status
- Event Date
- Description
- Locations
- Setup
- Participation link

Fundraising Summary

- Registrants
- Teams
- Amount Raised Online
- Amount Raised Offline
- Total Amount Raised
- Fundraising Goal

The fundraising summary is up-to-date summary information for the event

Definition: Participant Link

The participant link is the link your registrants will use to access the event registration website. Put this link on your organization website. Note: do not publish this link until you have finished modifying the event settings and tested the participation side.

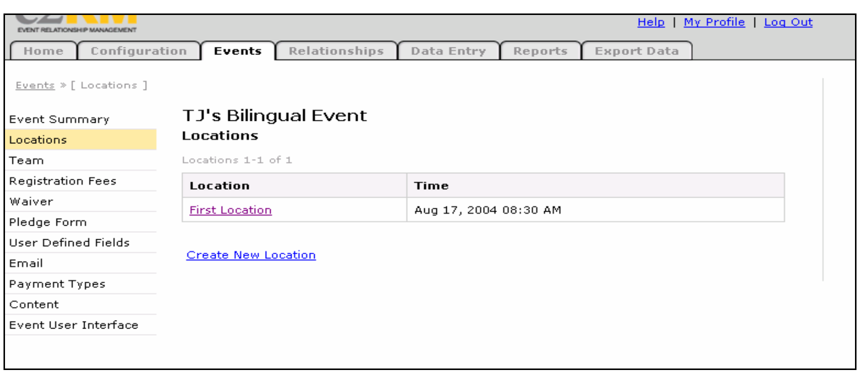
Once you have completed the basic setup of your new event, you can begin to modify its settings.

All of the event settings that can be modified are listed in the left navigation panel:

- Events
- Locations
- Team
- Registration Fees
- Waiver
- Pledge Form
- User Defined Fields
- Email
- Payment Types
- Content
- Event User Interface

Event:
Locations

The Locations page displays all the locations for your event and their associated times. Click on the location name to view and edit its settings.



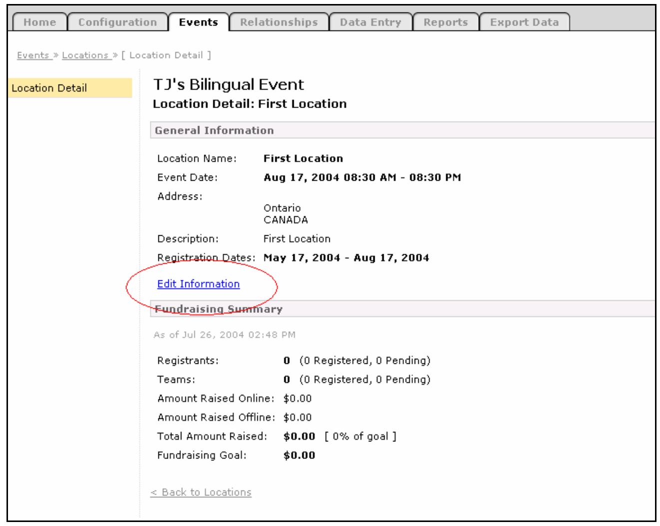
When you create a new event a default location called 'First Location' is created.

To view the location's settings, click on it

Location Details

This page displays the details of the location. Information on this page includes location name, event date, address, description, registration dates, and fundraising summary information.

To edit the location details, click the edit information link



Create New Location

Checklist- Create New Location

1. Location Name
2. Fundraising Goal
3. Event Start and End Dates
4. Address Information
5. Description
6. Long Description
7. Registration Start and End Dates
8. Export Location ID

To create a new location:

1. Click the 'Create New Location' link
2. Enter the location name
3. Enter the fundraising goal
4. Enter the event start and end dates
5. Enter the address information
6. Enter a description (optional)
7. Enter a long description (optional)
8. Enter the registration start and end dates
9. Enter the export location id
10. Click the 'Create' button

Follow the steps listed here to create the new location. The create new location link is located at the bottom of the locations page

Note: the Export Location ID is an ID specified by the administrator that identifies the location in the export file

Note: the long description is displayed on the "Select Location" page

Event:
Team

The default page in the team section is the Team Settings page. This page lists all the team types currently setup and allows administrators to modify the general settings. For team functionality to be enabled, at least one team type must be defined.

Definition: Team Type

A team type defines a set of characteristics common to one group of teams. These characteristics include: minimum members required, maximum members allowed, donations required to complete team registration, default fundraising goal, and the default setting for teams to show up in the directory (yes or no). Examples of team types: corporate, school, community

When an event is created, a team type called 'Default Team Type' is created. To edit settings, click on the name.

Create New Team Type

Checklist- Create New Team Type

1. Team Type
2. Description
3. Minimum Members Required
4. Maximum Members
5. Donations Required for Team Registration
6. Default Goal
7. Team Shows in Directory Default

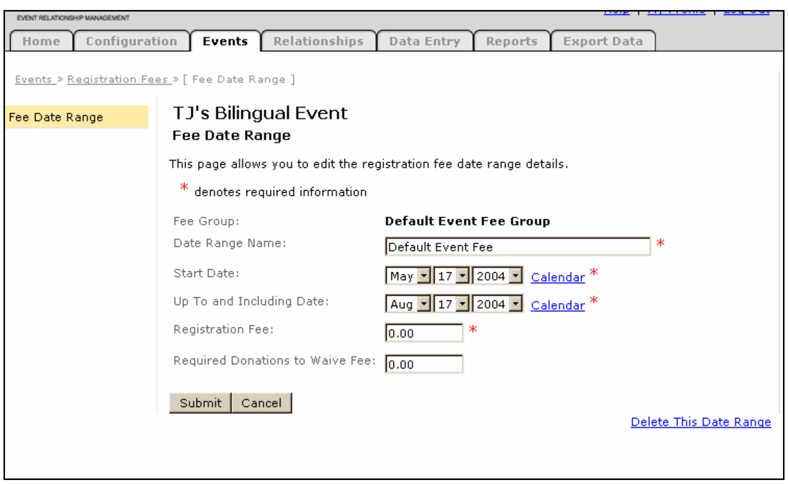
To create a new team type:

1. Click the ‘Create New Team Type’ link
2. Enter the team type
3. Enter a description
4. Enter the minimum members required
5. Enter the maximum members
6. Enter the donations required
7. Enter the default fundraising goal
8. Select the default for whether teams of this type show in the directory
9. Click the ‘Create’ button

Follow the steps listed here to create the new team type.

Event:
Registration Fees

This page allows you to specify registration fees for the event. When an event is created, a registration fee group called ‘Default Event Fee Group’ is created. To edit this name, click on the *Details* link beside it. This fee group can have a number of different date ranges and fees associated with it. A date range is automatically setup for the entire registration period with a fee of $0.00. If your event has no registration fee, leave this setting as is. To edit details, click on the date range name.



Edit Fee Date Range - the following details can be edited:

- **Name**
- **Start Date**
- **End Date**
- **Fee Amount**
- **Receiptable Amount**
- **Required Donations to waive Fee**

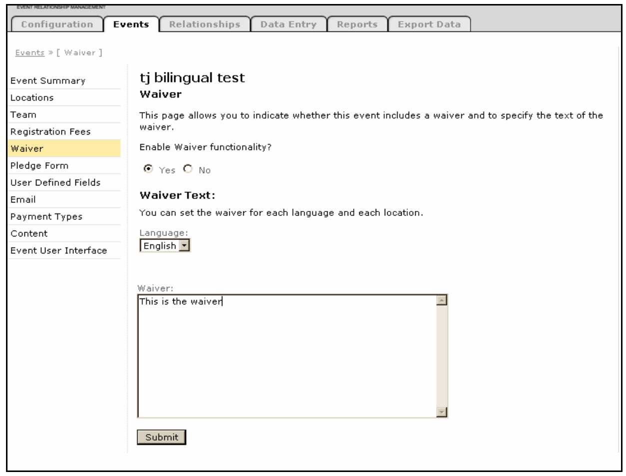
The date range can also be deleted from this page

Changing the end date creates a new fee date range for the remainder of the registration period. This date range is called ‘Define Registration Fee’. Its details need to be modified to create a name and a fee amount.

Event:
Waiver

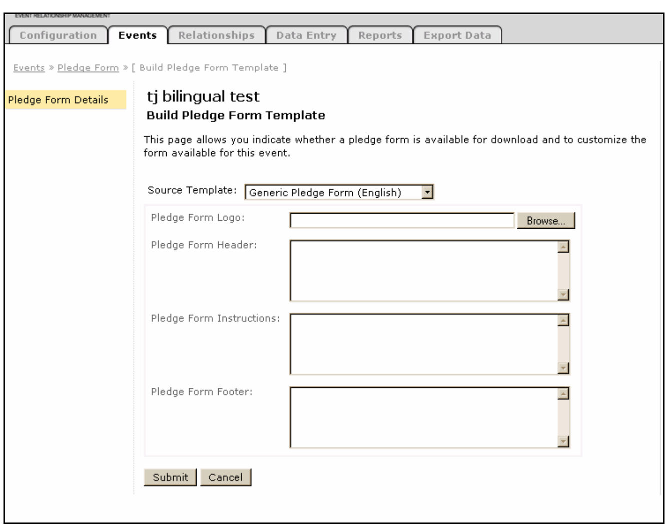
This page allows you to specify waivers for the event. Waiver text can be set for the whole event or specified for each location.

To set the waiver for the whole event, choose 'Default Waiver Content' in the Location drop down menu.



Event:
Pledge Form

This page allows administrators to setup a downloadable pledge form for the event. The form can be customized with your logo. The pledge form can be specified for the whole event or for each location. Select a location and click 'Submit/Build Form' to start. If you are building one form for the whole event, select 'Default Pledge Form' in the Location drop down menu.



Building the pledge form:

Choose the source template, upload your logo, enter the header, footer and instruction information, then click submit.

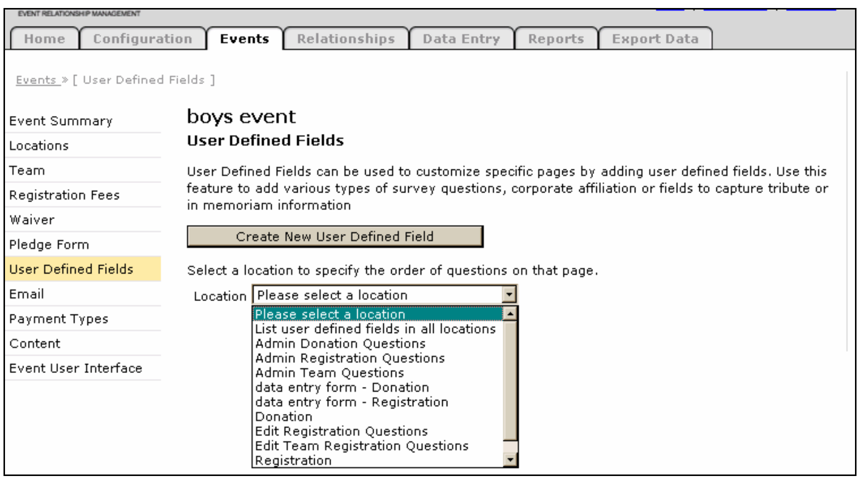
The pledge form is ready to go!

Once the pledge form has been built, you can view it by clicking the 'Preview' button.

If you choose to send Campagne Associates your pledge form to be uploaded, please ensure that the PDF file is a maximum of 200 kb, and that the creator of the file knows it's for web download. Contact your account manager for more information.

Event: User Defined Fields (formerly called "Survey Questions")

This page allows you the setup and manage the content for the user defined fields that will appear in the registration website. Use this feature to add various types of survey questions, corporate affiliation or fields to capture tribute or in memoriam information.



To create a new field, Select a page to display your question in the dropdown menu, select the language of content you wish to enter (if applicable) and click the 'Create New User Defined Field' button at the top of the page. To view existing questions for all pages, select "List user defined fields in all locations".

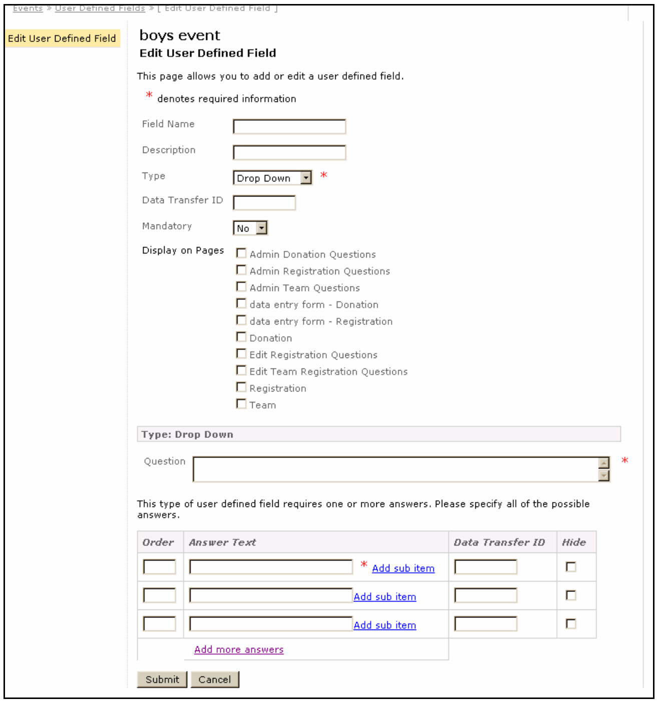
1. Select the question type
2. Enter the Data Transfer ID
3. Check the pages you would the field to appear on
4. Enter the question text as you would like it to appear
5. Select the language (if applicable)
6. Enter answer sort order, text and data transfer id (if required)
7. Click Submit

Follow these steps to create a user defined field.

Data Transfer IDs identify the questions and answers in the export file

Note: When entering answers for a drop down type, the first answer is always the default selected - text should be something like "Please Select"

To edit an existing user defined field, click on its name – all settings can be modified by the type.



Pages available for display:

- Admin Donation Questions
- Admin Registration Questions
- Admin Team Questions
- data entry form - Donation
- data entry form - Registration
- Donation
- Edit Registration Questions
- Edit Team Registration Questions
- Registration
- Team

Add sub item - only available for dropdown answers. This feature is used to add a sub question when a particular answer is selected from the dropdown list. Example - dropdown answer other - add sub item type "text line" - called "other". If the user selects other in the dropdown, the text line field will appear.

User defined fields can also be re-ordered and removed from pages – follow the steps below:

To re-order:

1. Select registration or donation from the drop-down menu to view sort order of fields
2. Change the order by renumbering the fields
3. Click "Save Sort Order"

To remove from a page:

1. Click on the name of the field you want to remove
2. In the 'Display on Pages' section, uncheck all pages
3. Click Submit
4.

To remove an answer from a question:

1. Click on the name of the field
2. In the 'Answers' section, check "hide" beside any answers you want to remove
3. Click Submit

Event:
Email

The WebCampaigns system has 15 set email types associated with events. These email types can be enabled or disabled to suit the particular event. ***Note: if an email type is disabled, the associated functionality may be disabled in the participant side.***

Email Types

Email	Description	If email is disabled…
Electronic Tax Receipt Correction	This email sends a corrected tax receipt to a donor	Administrators will not be able to reissue tax receipts
Electronic Tax Receipt Duplicate	This email sends a duplicate tax receipt to a donor	Administrators will not be able to reissue tax receipts
Express Register	This email is sent after a participant express registers someone else for the event.	Link to Register Other will not appear in the participant side.
Forget Password	This email is sent after someone requests their password	The email with the link to reset the password will not be sent
New Sponsor Notification	This email is sent to a sponsored participant after an approved donation is made.	No email will be sent.
Online Goal Reached	This email is sent to the participant when they reach their online goal.	No email will be sent indicating the goal has been reached.
Registration Confirmation Email	This email is sent to the participant when the registration process is completed	No registration confirmation will be sent.
Request Pledge Sheet	This email is sent after a registrant requests a pledge sheet – pledge sheet is attached	Link to download pledge for will not appear in the participant side - you need to enable this email for all locations.
Solicit Sponsors	This email is sent when the registrant solicits others to sponsor them	Link to solicit sponsors will not appear in the participant side
Solicited Thank You	This email is sent to the donor after an approved solicited donation is made to thank them for the donation.	No thank you will be sent
Solicited Tax Receipt	This email is sent to the donor after an approved solicited donation is made and includes the pdf tax receipt.	No tax receipt will be sent
Team Invite	This email is sent when a registrant invites other to join their team	Link to invite others will not appear in participant side
Unsolicited Thank You	This email is sent to the donor after an approved general donation is made to thank them for the donation.	No thank you will be sent
Unsolicited Tax Receipt	This email is sent to the donor after an approved general donation is made and includes the pdf tax receipt.	No tax receipt will be sent

To edit a system email, click on the name. Details are edited in 2 sections – general settings and email content.

General Settings	Email Content
▪ Email Name ▪ Email Type ▪ Description ▪ Sender Name ▪ Sender Email Address ▪ Reply to Email Address ▪ Status	▪ Subject content ▪ Message content **Note - a list of system keywords is below. Use these keywords to add personalized information to the email content**

Custom Email

You can also create Custom email types. Click on 'Create a custom email' at the bottom of the page

Email Settings
Enter a name, description, sender and reply-to for the email, click 'Next'

Email Content
Enter a subject line and message body (using keywords if desired), click 'Next'

Email Query
Select your audience, Donor, Participant, or All Donors & Participants. If you want all donors, participants, or donors & participants, remove the default query line by click on the word 'Remove' at the beginning of the line.

> **If you selected donor**, choose location or donation amount from the drop-down under 'Field'. For location, then choose a location from the drop-down under 'Value'. For donation amount, choose a condition (i.e. greater than, less than) from the drop-down under 'Condition', then enter a number in the 'Value' field. If you would like to query on location and donation amount, enter the location query, then click on 'Add new query entry' to create another query line. Follow the same steps for the donation amount query line.
>
> **If you selected participant**, choose location or participant total from the drop-down under 'Field'. For location, then choose a location from the drop-down under 'Value'. For participant total, choose a condition (i.e. greater than, less than) from the drop-down under 'Condition', then enter a number in the 'Value' field. If you would like to query on location and participant total, enter the location query, then click on 'Add new query entry' to create another query line. Follow the same steps for the participant total query line.
>
> **If you selected all donors & participants**, choose a location from the drop-down under 'Value'.

Once you have completed your query, click on 'Review' to go the next page.

Email Query Review
This page will list all donors and/or participants that will receive the email. If this needs changing, click on 'Back' to edit the query. If it is ok, click on 'Next' to go to the schedule page.

Email Schedule
Select a date and time that you want to send the email. It must be later than the current time. You can use the red & grey calendar button to find a date on a calendar (beside the year drop down). Click 'Finish'.

The system will now take you back to the Email Management page and you will see your email listed there. If you select the custom email from the list you will be able to view and/or edit the email settings, content, query and schedule (assuming the date/time hasn't passed). You can also preview the email there as well.

Keywords by email:

Electronic Tax Receipt Correction

%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%DonationAmount% Donation Amount
%DonationDate% Donation Date
%DonorFirstName% Donor's First Name
%DonorLastName% Donor's Last Name
%EmailAddress% Email Address
%FirstName% Donor's First Name
%LastName% Donor's Last Name
%LocationName% Location Name
%PostalCode% Postal Code
%ProvinceCode% Province

Electronic Tax Receipt Duplicate

%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%DonationAmount% Donation Amount
%DonationDate% Donation Date
%DonorFirstName% Donor's First Name
%DonorLastName% Donor's Last Name
%EmailAddress% Email Address
%FirstName% Donor's First Name
%LastName% Donor's Last Name
%LocationName% Location Name
%PostalCode% Postal Code
%ProvinceCode% Province

Express Register

%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% New Registrant's First Name

%HTMLLink% Link Back to System (application will insert the proper link)
%ConfirmationNumber% Confirmation Number
%LastName% New Registrant's Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain (if applicable)
%TeamName% Team Name (if applicable)

Forget Password

%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%ConfirmationNumber% Confirmation Number
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% Participant's First Name
%HTMLLink% Link Back to System (application will insert the proper link)
%LastName% Participant's Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain (if applicable)
%TeamName% Team Name (if applicable)

New Sponsor Notification

%HTMLink% (will link to event start page)
%DonationAmount%
%DonationDate%
%DonorFirstName%
%DonorLastName%
%EventEndDate%
%EventName%
%EventStartDate%
%LocationName%
%ParticipantFirstName%
%ParticipantLastName%

New Team Member

%HTMLLink% (will link to event start page)
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%ConfirmationNumber% Confirmation Number (does not apply to donation related email)
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%LocationName% Location Name
%LoginName% Login Name (does not apply to donation related email)
%ParticipantFirstName% Participant's First Name (does not apply to donation related email)
%ParticipantLastName% Participant's Last Name (does not apply to donation related email)
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Status (does not apply to donation related email)
%RegistrationStatus% Registration Date (does not apply to donation related email)
%TeamCaptain% Team Captain (does not apply to donation related email)
%TeamName% Team Name (does not apply to donation related email)

Online Goal Reached

%HTMLLink% (will link to event start page)
%AddressLine1%
%AddressLine2%
%AddressLine3%
%AddressLine4%
%Apartment%
%City%
%ConfirmationNumber%
%CountryCode%
%EmailAddress%
%EventEndDate%
%EventName%

%EventStartDate%
%LocationName%
%LoginName%
%ParticipantFirstName%
%ParticipantLastName%
%PostalCode%
%ProvinceCode%
%RegistrationDate%
%RegistrationStatus%
%TeamCaptain%
%TeamName%

Registration Confirmation Email
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% Participant’s First Name
%LastName% Participant’s Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain (if applicable)
%TeamName% Team Name (if applicable)

Request Pledge Sheet
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% Participant’s First Name
%LastName% Participant’s Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province

%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain (if applicable)
%TeamName% Team Name (if applicable)

Solicit Sponsors
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%ConfirmationNumber% Confirmation Number
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% Participant's First Name
%HTMLLink% Link Back to System (application will insert the proper link)
%LastName% Participant's Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain (if applicable)
%TeamName% Team Name (if applicable)

Solicited Tax Receipt
%AddressLine1%
%AddressLine2%
%AddressLine3%
%AddressLine4%
%Apartment%
%City%
%CountryCode%
%DonationAmount%
%DonationDate%
%DonorFirstName%
%DonorLastName%
%EmailAddress%
%EventEndDate%
%EventName%
%EventStartDate%
%LocationName%
%ParticipantFirstName%
%ParticipantLastName%
%PostalCode%
%ProvinceCode%

Solicited Thank You
%HTMLLinK% (will link to event start page)
%DonationAmount% Donation Amount (only applies to donation related email)
%DonationDate% Donation Date (only applies to donation related email)
%DonorFirstName% Donor's First Name (only applies to donation related email)
%DonorLastName% Donor's Last Name (only applies to donation related email)
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%LocationName% Location Name
%ParticipantFirstName% Participant's First Name
%ParticipantLastName% Participant's Last Name

Team Invite
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%ConfirmationNumber% Confirmation Number
%CountryCode% Country
%EmailAddress% Email Address
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%FirstName% Participant’s First Name
%HTMLLink% Link Back to System (application will insert the proper link)
%LastName% Participant’s Last Name
%LocationName% Location Name
%LoginName% Login Name
%PostalCode% Postal Code
%ProvinceCode% Province
%RegistrationDate% Registration Date
%RegistrationStatus% Registration Status
%TeamCaptain% Team Captain
%TeamName% Team Name

Unsolicited Tax Receipt
%AddressLine1% Address Line 1
%AddressLine2% Address Line 2
%AddressLine3% Address Line 3
%AddressLine4% Address Line 4
%Apartment% Apartment Number
%City% City
%CountryCode% Country
%DonationAmount% Donation Amount (only applies to donation related email)
%DonationDate% Donation Date (only applies to donation related email)
%DonorFirstName% Donor's First Name (only applies to donation related email)
%DonorLastName% Donor's Last Name (only applies to donation related email)
%EmailAddress% Email Address
%EventEndDate% Event End Date

%EventName% Event Name
%EventStartDate% Event Start Date
%PostalCode% Postal Code
%ProvinceCode% Province

Unsolicited Thank You

%HTMLLinK% (will link to event start page)
%DonationAmount% Donation Amount (only applies to donation related email)
%DonationDate% Donation Date (only applies to donation related email)
%DonorFirstName% Donor's First Name (only applies to donation related email)
%DonorLastName% Donor's Last Name (only applies to donation related email)
%EventEndDate% Event End Date
%EventName% Event Name
%EventStartDate% Event Start Date
%LocationName% Location Name

System keywords will also work in custom emails .

Event:
Payment Types

The Payment Types section allows administrators to define the types of payments accepted for registration fees and donations. Each type of payment can be enabled/disabled for both Public and Admin access. Currently in the WebCampaigns system, the payment type “Credit Card” with a Frequency of “One Time Payment” is enabled for both donations and registrations. All other payment types are disabled. Please contact your account manager for more information.

The following is a listing of payment types:

Payment Type	Frequency	Notes
Credit Card	One Time Payment	Available for both public and admin access
Credit Card	Monthly Payments	Available for both public and admin access

Event

Content

The content page is where your event really starts to take shape. This page lists all the pages in the registration website and allows you to customize the content of each page. *Default content is provided for each page in English and French.*

The pages listed are sorted into the following groups:

- Common Page Elements
- Prior to Login
- New Registration
- My Fundraising
- My Team
- My Profile
- Registration
- Donation Pages
- Other

To view page content, click on a page name. Page details are displayed in 2 sections – general settings and content preview. The general settings section displays the page name and description. Content preview shows you the actual page.

To edit the content, click the ‘Edit Content’ link on the left.

Each page has different content; edit the existing content as necessary.

Note: the WebCampaigns default page content contains HTML tags that may be unfamiliar. Please see the chart below for a quick reference guide.

HTML Tag	Description	Example	How it looks
	New paragraph	Test	Test
 	Makes text bold	Test	**Test**
<i> </i>	Make text italicized	<i>Test</i>	*Test*
<u> </u>	Underlines text	<u>Test</u>	Test
	Makes text a page title	Test>	**Test**
	Makes text page heading	Test	**Test**

Some page content also contains reserved system keywords that place customized values in the content. The keywords are between percent signs (% %). Do not alter these system keywords.

Content is also provided for a session error page. A session error occurs when a user's browser has inactive for more than 20 minutes. This page is in the group 'Other'.

Enabling Title Dropdown

The title dropdown field needs to be enabled on 4 pages:

1. Register a new participant
2. Contact Information
3. Register Others
4. Donation Page

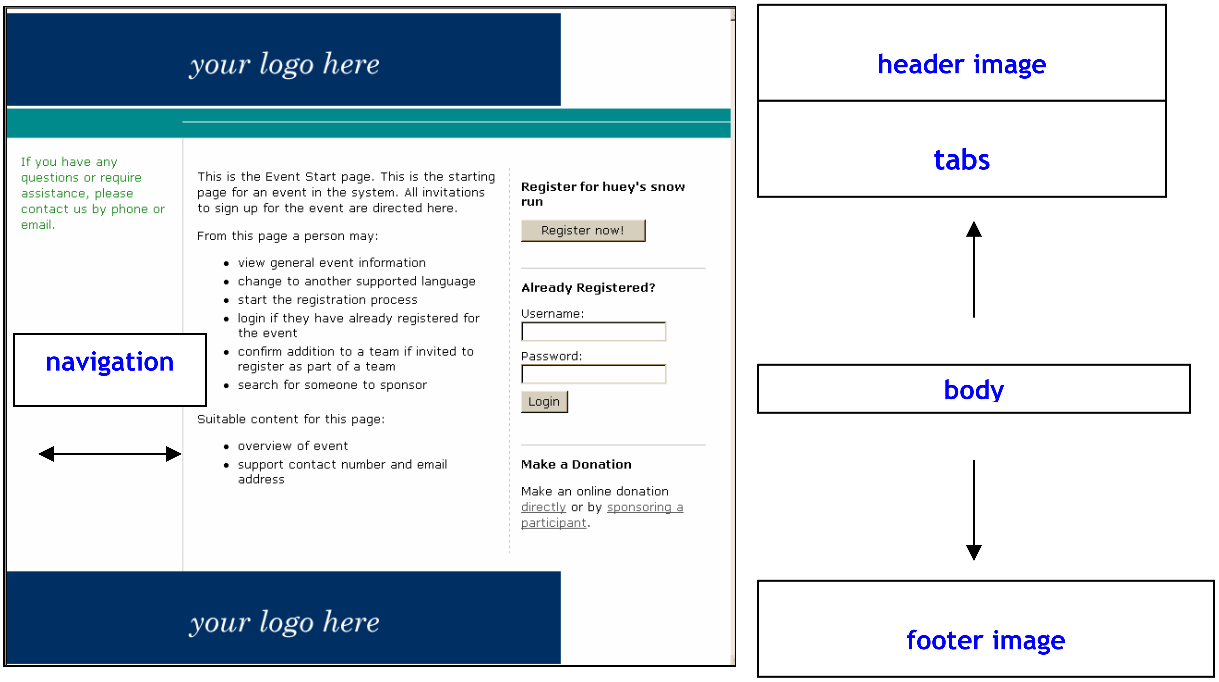
On the edit content page for each there are 6 fields:

- Label on Title Field (this is the new field)
- Label on Business Title text box (this is the old field – now called Business Title)
- Instructions at top of drop down list of titles (this sets a default selected text ie – "Please Select")
- Error message when required title is missing (this makes the dropdown field required ie - "Please select your title")
- Error Message indicating required field Business Title is missing (this makes the textbox field required ie - "Please enter your Business Title")

For events created after March 19 2004, the title drop down will automatically be enabled on the appropriate pages.

Event:
Event User Interface

This page allows you the set the look and feel of the particular event registration website. This page lists all the "parts" of the page and allows you to edit their content.



Background and font colours - named list:

Aqua	Darkgreen	Lavender	Orangered
Aquamarine	Darkmagenta	Lightblue	Pink
Beige	Darkorange	Lightcyan	Red
Black	Darkred	Lightgreen	Royalblue
Blue	Darkviolet	Lightgrey	Salmon
Blueviolet	Forestgreen	Magenta	Silver
Brown	Fuchsia	Maroon	Skyblue
Chartreuse	Gold	Mediumblue	Tan
Cyan	Gray	Midnightblue	Teal
Darkblue	Green	Navy	Violet
Darkcyan	Greenyellow	Olive	White
Darkgray	Indigo	Orange	

Font Family – font choices: **Need to choose 3 in order of display preference.

Arial	□□□□□□□□□□
Book Antiqua	Tahoma
Courier	Times New Roman
Garamond	Verdana
Helvetica	

Font size:

Relative – ranges from XXSmall – XXLarge
or Absolute – ranges from 6pt – 36 pt

Header and Footer sections allow you to upload images to be displayed in those areas. Tabs, Navigation, and Body sections allow you to specify background colours and font settings for those areas.

You can also edit the Personalization Defaults. This section allows you to specify the default personalization image and message for the personal sponsor page.

Specific Requirements:

Header
1. Image: using including logo, gif or jpeg between 600 & 800 pixels wide

Tabs
1. Regular tab: background colour, font family, font colour, font size
2. Active tab: background colour, font family, font colour, font size

Navigation
1. Navigation Panel(block of colour on left side, font relates to text above Log Out): background colour, font family, font colour, font size
2. Menu Heading: background colour, font family, font colour, font size
3. Menu Item: background colour, font family, font colour, font size
4. Active Menu Item: background colour, font family, font colour, font size

Body
1. Normal (text) : font family, font size, font colour
2. Heading 1: font family, font size, font colour
3. Heading 2: font family, font size, font colour
4. Heading 3: font family, font size, font colour
5. Heading 4: font family, font size, font colour
6. Heading 5: font family, font size, font colour

Footer
1. Image: optional gif or jpeg between 600 & 800 pixels wide

Personalization
(default image and message for my donation page)
1. Default image (gif or jpeg 500 pixels W X 400 pixels H)
2. Message text

Event : Summary

In the Event Tab we have control over all aspects of event creation and management. The settings controlled in this section of the Administration Console are specific to each event created.

We have seen how to create events, enter different locations, setup registration fees, specify a waiver and a pledge form, enter email content, edit page specific content, and create the look and feel for the registration website using images, fonts, and colours.

Once your event is setup, you can post the Participant Link on your website – now your event registration is live! Users can register and make donations.

What's next?

After your event registration website has gone live, your focus shifts from event creation and content management to event data management and constituent support. To access constituent data, click on the **Relationships** tab.

Relationships

The Relationships tab gives you access to all constituent data. You can modify contact information, view team details, view payments, void or reissue tax receipts, and change event registration information.

You can search for registrants or donors. You can also search for teams by clicking "Teams" in the gray navigation bar.

Relationships: Constituents

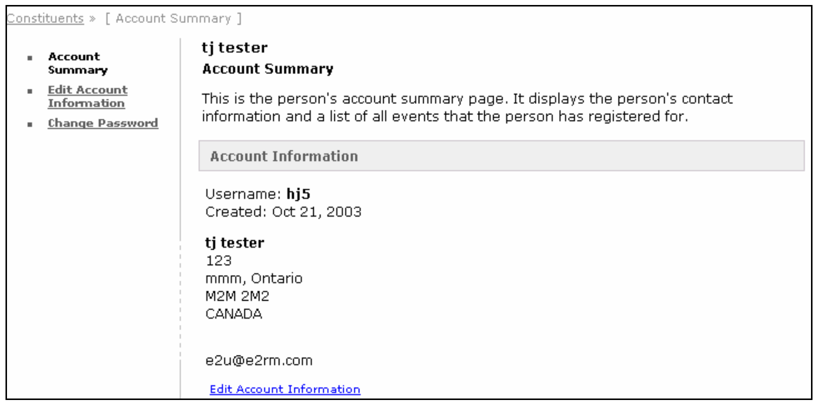
Once you have searched for a constituent, click on the name in the search results to view their information.

The account summary page displays the following:

Account information - username and contact information

To edit, click "edit account information"

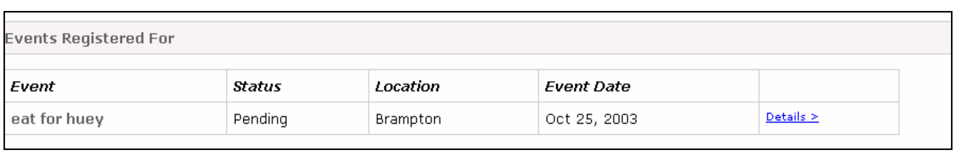
To change their password, click the link on the left.



Any of the contact information can be changed including name, address, and email.

Events registered for - any events the person has registered for, the location and their status.

Click on the details link to view and edit the registration information.



Events Registered For

Event	Status	Location	Event Date	
eat for huey	Pending	Brampton	Oct 25, 2003	Details >

Clicking on the details link in the event section brings you to the registrant event summary page. From this page you can complete the following tasks:

- Edit Registration Information
    - change the location
    - change the registration status
    - change the payment status
    - change fundraising goals – both online and offline
    - change search consent

- View Payment Information
  - View any payments made by the registrant for the event
  - Change the status of the payment
  - Void the payment (*note - this flags the payment as voided in the WebCampaigns system only; you need to refund the payment with your payment provider as well*)

- View Sponsors
  - View all sponsors for the registrant
  - View and edit the details of each donation

- Team Information
  - View Team Summary
  - Edit team information including name, description, type, status, and goal
  - View all team members
  - Remove registrant from team

Donations - any donations this constituent has made.

Note: this is not the registrant's donor list. This is donations made by this person.

Click on the details link to view and edit the donation information.

Donations

Date/Time	Amount	Event	Solicitor	
Nov 10, 2003	$22.00	eat for huey	tj tester	Details >

Clicking on the Details link in the Donations section brings you to the donation summary page. From this page you can do the following:

- Edit Donation Information
  - Edit date, status and donation type

Monthly Donation Plans

Start Date	Payment Method	Amount	Event	Solicitor	Status	
May 1, 2004	Credit Card	$1.00	TJ&KG		Active monthly plan	Details >

Monthly Donation Plans - any monthly donations this constituent has made.

Click on the details link to view and edit the monthly donation plan

Clicking on the Details link in the Monthly Donations section brings you to the monthly donation plan summary page. From this page you can do the following:

- Edit Plan Information – the following can be edited:
  - Start Date
  - Amount
  - Status
  - Number of Installments

- Change Credit Card
  - Change the type, number and expiry date

- Installments
  - Edit installment details
  - Edit donation details
  - Edit payment details

Tax Receipts **– tax receipts issued to this person.**

Click on the details link to view the receipt information and to void or issue a duplicate/correction.

Tax Receipts

Tax Receipt Number	*Date*	*Amount*	*Status*	
A000000003	Nov 10, 2003	$22.00	New Tax Receipt	Details >

Clicking on the Details link in the Tax Receipts section brings you to the receipt summary page. This page displays the details of the particular tax receipt and allows you to do the following:

- Void the tax receipt
  - *Doing this voids the receipt on the online system only*

- Issue duplicate or correction
  - Choose duplicate or correction
  - Optional - enter a different email address to send the receipt to
  - Click “Yes, Issue”

Note – make sure the correction and duplicate email types are enabled for the particular event that the donation is related to.

Duplicate VS Correction

Duplicate receipts are any exact copy of the original - they will use the same "template" and donor information; so changes in signature, etc as well as changes to donor information will not be reflected.

Correction receipts void the old receipt and create a new receipt (new number) - any changes to donor information will be reflected – the text “replaces tax receipt “ appears below donation information with the voided tax receipt number.

Relationships: Teams

You can also search the system by teams. Select an event, type the team name and click search. To edit the settings of a team, click their name in the results list.

The Team Summary page shows the general information about the team as well as the team fundraising information. The following tasks may be accessed from this page:

- Edit team information including name, description, type, status, and goal
- View all team members
- Edit team members information

Event Data Management

The last 2 tabs in the Admin Console allow you to view the event data in various ways. The **Reports** tab allows you to filter the data and view it in a formatted report. The **Export Data** tab allows you to download all raw event data in a CSV (Excel) or XML format ready to import into your backend system.

Reports

The reports section gives you access to real-time data in report format. The WebCampaigns system currently has the following report types:

Registration Detail - contains registration data including:

- Event summary information (total registrants, total donations, total registration fees)
- Participant information – name, address, registration date, registration status, registration fee status and total donations collected

To generate a registration detail report, select the event and location and click 'Run Report'

Donation Detail – contains all donation data including:

- Event donation summary information (total donation amount and total # of sponsors)
- Donation information – donor name and address, donation date, type and amount, tax receipt information

To generate a donation detail report, select the event and location then specify a start and end date and click 'Run Report'

Team Detail – contains all team data including:

- Team name
- Captain name and contact information
- # of team members

To generate a team detail report, select the event , date range and location and click 'Run Report'

Snapshot Report – An excel file containing all data (participant and donation) regarding 1 event (all locations or 1 location). The report fields are:

• Transaction Type • Last Name • First Name • Donation Amount • Title • Middle Name • Initial • Preferred Language • Address Line 1	• Apartment number • Area Code • Phone Number • Extension • Email Address • Email Contact Permission • Registration Status • Registration Fee Status • Team Name	• Team Type • Team Captain ID • Donation Type • Donation Date • Tax Receipt Number • Tax Receipt Voided • Solicitor ID • Constituent ID • Location ID

To generate a snapshot report, select the event and location, and click “Run Report’. Then click ‘Download Report’.

Export Data

The export data tab gives you access to the raw event data in a format that is ready for import into your GiftMaker Pro or other backend system. The data files can be downloaded in 2 file types: CSV (Excel) or XML.

To generate a new file, click on the ‘Request Export’ button. All new and changed information from the last export will be put in the new files. A new file will appear below the request button with a request date and request status of “new”.

When the new file is ready to be downloaded, the request status will change to “processed” and the file name will appear. To download the file, choose the file type from the dropdown menu and click on the file name. You will be prompted to open or save the file.

Note: the data in the export file is not filtered or sorted in any way. The data is from all events (if you have more than one).