

## Sphere Friends Asking Friends Guide

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Sphere Friends Asking Friends- 2015

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# Thon Event Website

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This chapter includes detailed explanations on how to create a thon event Website.

## Create a Thon event Web site

Use the table below to determine what you want to do.

What do you want to create/do?	What you will accomplish	What you need to set up
<a href="#">Basic Thon</a>	Create a basic site that enables you to collect registrations and donations from individuals.	Required Items
Thon with advanced features	Create a custom site that contains non-standard Thon features and capabilities.	Contact your Sphere sales representative
<a href="#">Launch an event site</a>	Activate the Thon so your visitors can access it on the Internet.	Friendly URL
<a href="#">Configure event information</a>	Complete the first of four required steps to configure a Thon event	Event Information page
<a href="#">Configure fee structure</a>	Complete the second of four required steps to configure a Thon event	Fee Structure page
<a href="#">Configure front page customization</a>	Complete the third of four required steps to configure a Thon event	Front Page Customization page (for events that use Standard Design Templates)  Website Design page (for events that use Essential Design Templates)
<a href="#">Configure event text</a>	Complete the fourth of four required steps to configure a Thon	Event Text page

	event	
<b>Thon &gt; Event Customization</b>		
<a href="#">Configure event schedule</a>		
<a href="#">Add custom menu links</a>	<ol style="list-style-type: none"> <li>1. Create links on your Thon site to external documents or pages on other sites.</li> <li>2. Create a basic site that enables you to create links to your external documents using CMS (for example, to upload PDFs or create stand-alone Web pages).</li> </ol>	<ol style="list-style-type: none"> <li>1. Website Features &gt; Custom Menu Items</li> <li>2. Website Features, CMS</li> </ol>
<a href="#">Enable smartphone detection</a>	Add functionality that enables the event website to detect when users access pages from a mobile device.	<p>Website Features &gt; Detect and forward Mobile Devices to Mobile Forms</p> <p>Website Info &gt; Customize Forms &gt; Mobile Donation Form</p> <p>Website Info &gt; Customize Forms &gt; Mobile Registration Forms</p>
<a href="#">Enable Volunteer Registration</a>	Add functionality that enables you to collect volunteer registrations.	<p>Website Features &gt; Volunteer Registration</p> <p>Volunteer Library</p> <p>Website Info &gt; Customize Forms &gt; Volunteer Registration</p>
<a href="#">Enable booth registration</a>	Add functionality that enables registration for booths.	Website Features > Booth Registration
<a href="#">Enable Sponsorship Opportunities</a>	Add functionality that enables you to offer and receive sponsorships online.	<p>Website Features &gt; Sponsorship Opportunities</p> <p>Webinfo checklist &gt; Sponsorship Information</p> <p>Website Info &gt; Customize Forms &gt; Sponsor</p>
<a href="#">Configure social media website features</a>	Integrate your organization's social media accounts with a Thon event site.	<p>Social media accounts</p> <p>Website Features &gt; Event Social Media</p>

<a href="#">Enable team registration</a>	Add functionality that enables you to collect individual and team registrations while still collecting donations from individuals.	Website Features > Team Registration
<a href="#">Enable multiple registrants/family registration</a>	Enable functionality to allow multiple registrations with one transaction and/or family registrations.	Website Features > Allow Multiple Registrations per Transaction
<a href="#">Enable a mobile fundraising app</a>	Enable a mobile fundraising app for <i>Friends Asking Friends</i> participants to download	Website Features > Mobile App
<a href="#">Enable CAPTCHA for payment submission</a>	Enable CAPTCHA on Friends Asking Friends registration and donation forms to help prevent spam and other abuse.	Website Features > CAPTCHA for Payment Submission
<a href="#">Configure image and text library</a>	Add images, videos, and text to appear on participant web pages	Webinfo Checklist > Event Customization > Image and Text Library for Page Customization
<a href="#">Set up an E-mail template</a>	Set up a template that registrants can use to send E-mail to supporters.	Webinfo Checklist > Event Customization > Email Center Templates
<a href="#">Configure sponsor information</a>	Add sponsor opportunities so that you can offer and receive sponsorships online	Webinfo Checklist > Event Customization > Sponsor Information
<a href="#">Set up credits and debits</a>	Set up credits and debits for an event participant.	Webinfo Checklist > Credits and Debits Bookkeeping > Manage Initiative Records
<a href="#">Configure donor giving levels and participant incentives</a>	Add donor giving levels in participant event pages.	Webinfo Checklist > Event Customization > Donor Giving Levels and Participant Incentives
<a href="#">Add a Quiz game</a>	Add a quiz game to an event page.	Webinfo Checklist > Event Customization > Quiz
<b>Thon &gt; Add-Ons</b>		
<a href="#">Set up an online auction</a>	Add auction functionality on your Thon site.	Webinfo Checklist > Add Ons > Auction Information
<a href="#">Create an Opportunity Drawing (an online lottery of</a>	Add opportunity drawing functionality to your Thon site.	Webinfo Checklist > Add Ons > Opportunity Drawing

<a href="#">prizes)</a>		
<a href="#">Set up a poll</a>	Add Poll functionality to your Thon site.	Webinfo Checklist > Add Ons > Poll
<a href="#">Set up an online electronic store via eCommerce</a>	Add eCommerce (store) functionality to your Thon site.	Webinfo Checklist > Add Ons > eCommerce
<a href="#">Customize forms</a>	Customize forms in your Thon site.	Webinfo Checklist > Add Ons > Customize Forms
<a href="#">Customize participants' HQ settings</a>	Allow participants to use gadgets such as Honor Roll Scroll and Thermometers on community pages to show funds raised to date.	Webinfo Checklist > Add Ons > Participant HQ Settings
<a href="#">Add Google Analytics</a>	Add a Google Analytics code snippet to your Thon site. Also, access URL information to configure destination goal and funnels in your Google Analytics account.	Google Analytics account Webinfo Checklist > Add Ons > Google Analytics
<b>Administrative Tasks</b>		
<a href="#">Set up a pyramid or company structure</a>	Add functionality that enables you to add event groups (for example, <i>companies &gt; teams &gt; team members</i> ).	Manage Event Groups in Organization Setup Event Admin for the Thon Website Features > Event Teams
<a href="#">Create an event template</a>	Create an event in which you define attributes such as images, text, and colors for other events to use.	Control > Administration > Organization Setup > Manage Event Group
<a href="#">Copy an existing Thon</a>	Copy an existing Thon to create a new one.	Thon must exist
<a href="#">Delete a Thon</a>	Remove a Thon from the database. Once you remove a Thon, you cannot recover it.	Thon must exist

## Create a basic Thon event site

Use this procedure to create a basic Thon event site. You will only complete the items and fields that are required.

### Prerequisites

- If you do not plan to use the Sphere Default Fund, you must set up funds.
- If you plan to associate the event site with a campaign, you must set up Campaigns.



<b>Starting point:</b>	You are logged into Sphere.
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### Step 1: Create the event site

1. Select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. In the *Special Events: Kintera Thon Events* page, click **New**.
3. In the *Complete Initiative Information* page, perform the following steps:
  - a. For *Name*, enter the event's name, for example *Walk for Peace* (up to 140 characters).

**Note:** The event's name will be seen by all visitors of the Web site. Make sure it is clear, correctly spelled, and grammatically correct. As a best practice, include date-specific information in the title of the Thon event (for example, *Walk for Peace 2008*), especially if you have or will have multiple Thon events in the future.

- b. For *Fund*, select the appropriate fund or the Sphere Default Fund.
- c. Click **Submit**.
- d. In the confirmation page that appears, verify your information and then click **Finish**.  
The *Special Events: Kintera Thon Events* page is displayed, showing the new event site you created in the list.
- e. Complete required items as described below.

### Step 2: Complete required items

1. In the *Special Events: Kintera Thon Events* page, highlight the event's name and then select **Website Info**. The *Event Website Creation Checklist* page appears.
2. Click **Event Information** and complete the *Event Information* page as follows:
  - a. For *Event Name*, the text box is already populated with the name you assigned when you created the event. If you are satisfied with the name, no changes are necessary.
  - b. For *Event Date*, click the calendar icon to select the date when the event is to start. You can also enter the date as shown in the example on screen.
  - c. For *End Date*, click the calendar icon to select the date when the event is to end.

**Note:** Your event will not be automatically turned off on the End Date that is specified in this section. In order to end your event, you must disable it.

- d. For *City* and *State/Province*, enter the appropriate information. For *State/Province*, enter the abbreviated version of the State or Province (for example, for California you would enter *CA*).
- e. For *Event Contact Email*, enter the E-mail address of the person you want to be contacted if site visitors have questions or comments regarding the event. Sphere will generate and send a confirmation E-mail to the visitor, and the E-mail address you specify will appear in the *From* field of the visitor's E-mail application.
- f. For *Keywords*, enter the specific words you want potential site visitors to type into Search engines to find your event page on the Internet.

This is not a required field, but you should complete it. The text box shows a list of keywords the system automatically generates. The first keyword entry is your event's name, and the second

entry is the name of the account as it appears in Sphere. Notice that each keyword is separated with a comma.

- g. Click **Save** to accept the changes.
  - h. Click **Webinfo Checklist** in the Breadcrumb to return to the *Event Website Creation Checklist* page.
  - i. Verify that **Event Information** contains a check mark. This indicates that you have successfully completed all required fields for *Event Information*.
3. Click **Fee Structure** and complete the *Participant Registrant Information* page as follows:

- a. In the *Registration Fees* section, click **Add Registration Type**.

The *Add Registration Type* window opens and contains three tabs: *General Information*, *Payment Information*, and *Advanced*. The *General Information* tab is in focus.

- b. For *Name*, enter a name for the registration type or accept the default name.

**Note:** Specifying registration types enables you to create different levels and types of registrations (for example, Adults, Children, Under 12, Platinum Member, and so on).

- c. For *Description*, enter a brief description for the registration type.
- d. Select the **Payment Information** tab.

In this page, specify whether event registrants will need to pay a registration fee and how they will make payments.

- e. For *Are there any fees to participate for this activity?*, click **No** if there are no registration fees for the event, or **Yes** if there is a fee. If you click **Yes**, complete the following fields:
  - i. Click **Single Payment** if you want registrants to pay the registration fee in one lump sum. Type the amount of the registration fee, the date when registrations are considered late (if applicable), and the fee for late registrations (if applicable).
  - ii. Click **Installment Payment** if you will allow registrants to make periodic payments. Specify how often they can make payments (*Payment Frequency*), the number of payments to be made (*Number of Payments*), and the payment amount (*Payment Amt.*). The *Payment Total* field shows the total amount to be paid (for example, if you select *Monthly* and then enter 5 payments in *Number of Payments*, and \$5 in *Payment Amt*, *Payment Total* will show \$25).

**Note:** You can also enter the payment total and number of payments, and Sphere will calculate the payment amount. For example, if you enter \$25 in *Payment Total* and 5 in *Number of Payments*, Sphere will automatically calculate the payment amount and will enter 5 in *Payment Amt*.

**Note:** You cannot use the *Installment Payment* option if you will allow more than one person to register and make one payment for everyone in the group. For this, you need to set up *Allow Multiple Registrations per Transaction* in *Website Features*. For example, if you will allow several members in one family (or a group of friends) to pay their registration fees together as one payment (transaction), you must use *Website Features* to enable multiple registrations.

- f. Click **Save**.
  - g. Click **Webinfo Checklist** in the Breadcrumb to return to the *Event Website Creation Checklist* page.
  - h. Verify that **Fee Structure** contains a check mark.
4. Click **Website Design** and complete the *Website Design* page. When done, click **Save**, return to this

procedure and perform the following steps:

- a. Click **Webinfo Checklist** in the Breadcrumb.
- b. Verify that **Website Design** contains a check mark.
5. Click **Event Text** and complete the *Event Text* page as follows:
  - a. For *Spread the Word*, perform the following steps:
    - i. For *Subject Line*, accept the default text or make the necessary changes. We do not recommend that you change any text that appears within brackets.
    - ii. For *Message*, enter your *Spread the Word* message.
  - b. Click **Save**.
  - c. Click **Webinfo Checklist** in the Breadcrumb to return to the *Event Website Creation Checklist* page.
  - d. Verify that **Event Text** contains a check mark.
  - e. Update and preview the event site as described below.

### Step 3: Update and preview the event site

1. In the *Event Website Creation Checklist* text box at the top of the page, click **Preview** for *Actions*.
2. Click **Publish This Event Now** and confirm that you want to publish changes to the website.
3. For *Web address*, click **Go**.
4. Click **OK** in the pop up window that appears. The event site opens in a browser window.
5. Preview the event site to make sure you are satisfied with it. When done, close the browser and return to the *Event Website Creation Checklist* page.
6. For *Friendly web address*, click **Edit** to open the *Create Friendly URL* page.
7. Enter your friendly URL in the text box, if necessary and then click **Submit**.

The *http://* and *.kintera.org/* are already entered for you. You only need to specify the address and page to open (for example, *www.mysite.kintera.org/myeventpage.htm*). You would supply the *www.mysite* and *myeventpage.htm* information. If the friendly URL is successfully accepted, you will see the following message displayed:

Congratulations, your friendly URL is *http://mysite.kintera.org/myeventpage.htm*

**Note:** You can advertise this friendly URL address so that visitors to your Web site can use it instead of the default Web address the system assigns, which may be more difficult to memorize or pass along.

8. Click **Webinfo Checklist** in the Breadcrumb.
9. Verify that *Friendly web address* now contains your friendly URL. You are now ready to activate the site so that it is available on the Internet for site visitors to access and use.

**Note:** In the *Friendly web address* section, you can click **Go** to open the event in a browser window. You can click **Edit** to modify or change the Web address that you created. You will only click **Release** if the friendly Web address will be applied to a new event and will no longer be used by the original event.

10. For *Actions*, click **Activate**.
11. Click **Publish This Event Now**, and confirm that you want to publish changes to the website.
12. Open a browser window and test the URL. You may need to wait a couple of minutes before you can view the site.

**Note:** When you activate your Web site, all test data, test contact, and test donation information will be deleted. Also, if you want to return to *Preview* mode, you must first disable the site by clicking **Disable**.

**Congratulations! You have successfully created a Thon event Web site.**

## Launch an event site

Use this procedure to launch an event site once it is ready for your visitors to access over the Internet. Launch the site after you have tested it thoroughly.

### Prerequisites

- The event site is [created](#) and has been [tested](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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- In the *Event Website Creation Checklist* page, click **Publish This Event Now**.
- Confirm that you want to publish changes to the website.
- For *Friendly web address*, click **Edit** to open the *Create Friendly URL* page.
- Enter your friendly URL in the text box, if necessary and then click **Submit**. The `http://` and `.kintera.org/` are already entered for you. You only need to specify the address and page to open (for example, `www.mysite.kintera.org/myeventpage.htm`). You would supply the `www.mysite` and `myeventpage.htm` information. If the friendly URL is successfully accepted, you will see the following message displayed: Congratulations, your friendly URL is `http://mysite.kintera.org/myeventpage.htm`

**Note:** You can advertise this friendly URL address so that visitors to your Web site can use it instead of the default Web address, which may be more difficult to memorize or pass along.

- Click **Webinfo Checklist** in the Breadcrumb.
- Verify that **Friendly web address** now contains your friendly URL. You are now ready to activate the site so that it is available on the Internet for site visitors to access and use.

**Note:** Click **Release** only if the friendly Web address will be applied to a new event and will no longer be used by the original event.

**Note:** In the Friendly web address section, you can click **Go** to open the event in a browser window. You can also click **Edit** to modify or change the Web address that you created.

- For *Actions*, click **Activate**.
- Click **Publish This Event Now**, and confirm that you want to publish changes to the website.
- Open a browser window and test the URL. You may need to wait a couple of minutes before you can view the site.

**Note:** When you activate your Web site, all test data, test contact, and test donation information will be deleted. After you activate a Web site, you can disable it by clicking **Disable**. Additionally, you cannot return to *Preview* mode after the site is activated.

## Configure event information for an Event Web site

1. In the Event Website Creation Checklist page, click **Event Information** in *Required Items*.
2. In the Event Information page, perform the following steps:
  - a. Configure Event Details as follows:
    - i. For *Event Name*, the text box is already populated with the name you assigned when you created the event. Leave it as is, or enter a new name.
    - ii. For *Event Date*, click the Calendar tool to select the date when the event is to start. You can also enter the date as shown in the example on screen.
    - iii. For *End Date*, click the Calendar to select the date when the event is to end. This is the date when you want the Web site to no longer show the event page (usually, 3 months after the beginning event date).
    - iv. For *Event Description*, enter a brief description for the event.
    - v. For *Event Goal*, enter total U.S. dollar expected to collect for the event (for example, 130000). Do not enter the dollar sign (\$) before the dollar amount, and do not use commas (for example, 130,000).
  - b. Configure Event Location as follows:
    - i. For *Location*, specify where the event will take place (for example, Balboa Park, Marriott Hotel, Children's Museum, and so on). You may also want to include parking and driving directions. .
    - ii. For *Address 1*, enter the physical address where the event will take place.
    - iii. For *Address 2*, enter a second address if necessary.
    - iv. For *City*, *State*, and *Zip*, enter the appropriate information. For *State*, enter the abbreviated version of the State (for example, for California you would enter CA).
    - v. For *Embed Map Code*, copy the embed code from a map website and paste it into the field. The code adds a map image to the Web site's *Event Location* page. To only include a link to the map website, instead of an image of the map, enter the link in the field in http:// format.

**Note:** To generate the embed code, enter the address of the event location in a map website. The embed code is typically available on the page that includes the map. If necessary, you can change the HTML to increase or decrease the zoom setting provided by the map website.
  - c. Configure Event Contact Information as follows:
    - i. For *Event Contact Email*, enter the E-mail address of the person you want to receive E-mails from visitors of the event page when they register for an event. This is usually the E-mail address of the event coordinator who will answer questions associated with the event.

Sphere will generate and send a confirmation E-Mail to the visitor (if you configured E-mail Confirmations), and this E-mail address will appear in the *From* field of the visitor's E-mail application.

- ii. For *Event Contact Phone*, enter the phone number of the person you want to include in confirmation E-mails to visitors of the event page. This is the person who will answer questions regarding the event. The phone number appears in the confirmation E-mail.
  - iii. For *Event Contact Name*, enter the name of the person you want to include in confirmation E-mail to visitors of the event page. The name appears in the confirmation E-mail.
  - iv. For *Alternate Event ID*, enter an ID that has more meaning to you (or to be used for tracking purposes). Sphere will automatically assign this event an ID.
- d. Configure *Meta Tags - for Search Engine Optimization* as follows:
- i. For *Description*, enter the summary you want to appear in Search engine results page when potential visitors to your site conduct a search for the event from a Search engine (such as Google).
  - ii. For *Keywords*, enter the specific words you want potential visitors to your event page to use in Search engines to find your event page on the Internet. Separate each word with a comma.
3. Click **Save**.
  4. Configure [Fee Structure](#) (or Registration Fees).

## Configure Thon fee structure

Use this procedure to configure fundraising goals for participants of a Thon event, and establish registration levels for event participation, establish fees for the event participants.

1. In the *Event Website Creation Checklist* page, click **Fee Structure** in *Required Items*.

**Note:** Use the Breadcrumb to display the checklist, if necessary.

2. In the Participant Registrant Information page, perform the following steps:
  - a. Configure Min Goal Amount as follows:
    - i. For *Suggested Goal Amount*, specify how much money (in USD) you want participants to raise for the event to help you accomplish your event goal.
    - ii. For the *Do not allow Participant...* check box, select the check box if you want to prevent participants from being able to change the dollar amount you specified .
    - iii. For the *Collect credit card information...*, select the check box if you want to collect credit card information for the participants of the event. Some participants will agree to pay the difference if they do not meet their fundraising goal. Selecting this box allows you to collect their credit card information from the CRM database, so that their credit cards can be billed for the difference.
    - iv. Click **Add Minimum Goal** to set the amount you entered in *Suggested Goal Amount* as the minimum amount of dollars to raise for the event.
    - v. For *Fundraising Goal Text*, enter a brief note to send to the participants of your fundraising effort, and then click **Update Text**.

b. Configure Maximum Transaction Limit as follows:

- i. For *Select Form*, select a form to apply a transaction limit. For example, include a transaction limit if you do not want to incur transaction fees for large donations.
- ii. For *Maximum Transaction Limit*, specify the maximum amount to collect through the form. Enter the dollar amount without the dollar sign or comma. When you include a limit, no single transaction can exceed the value you indicate.

**Note:** Sphere only uses the maximum transaction limit you enter if the amount is smaller than the \$25,000 Sphere payment processor limit. If you use a custom payment processor, contact the processor service to learn your transaction limit.

- iii. Click **Add Maximum Transaction** to set the amount you entered in *Maximum Transaction Limit* as the limit. If you enter \$0, Sphere only applies the payment processor limit for transactions.

The *Maximum Transaction Limit* field appears, showing the amount you entered and the form that will be used. You can always change the amount by clicking **Edit**.

c. Configure Registration Fees as follows:

Click **Add Registration Type**.

In the *Add Registration Type* window, establish registration levels as follows:

**Note:** A Registration Type is a level you define for rewarding event participants (your fund raisers).

i. *General Information* tab:

- A. For *Name*, enter a name for the registration type (for example, First Place, Second Place, and so on).
- B. For *Description*, enter a brief description describing the registration type.
- C. Select the **Payment Information** tab.

ii. *Payment Information* tab:

- A. For *Any there any fees to participate for this activity?*, click **Yes** or **No**. If you click Yes, complete the other fields in the window, as necessary.
- B. Click **Single Payment** if you plan to receive registration fees in one lump sum. Enter the registration fee for the event, the start date when late fees will be added to the registration fee for participants who register late (in the format shown), and any penalties (in USD) that will be added to the registration fee. Enter dollar amounts with no dollar sign (\$) and without commas (for example, 25).
- C. Click **Installment Payment** if you plan to receive the registration fee in partial payments. In *Payment Frequency*, specify of often you expect to receive partial payments until full registration is paid; in *Number of Payments*, specify how many payments the participant will make for the frequency selected; and then either enter the total amount expected, or the amount of payment accepted according to the payment frequency.

iii. *Advanced* tab:

**Note:** In the *Advanced* tab, configure for the fundraising event including gifts you will give to the event participants, age requirement for event participants, and fundraising goals, if you did not configure it when you configured [Event Information](#).

- A. Select the **Sphere Only** check box.
- B. If you plan to hand out T-shirts during the event, select the appropriate **Size** check box, and specify any fees you plan to charge for the T-shirts (if any).
- C. Select the **Make T-Shirt Field Required** to enforce selection of a T-shirt on the event page.
- D. For *Gift Value*, specify how much the T-shirt gift is worth.
- E. Configure *Fundraising Goal* as described in Step 2a, if you did not configure this goal.
- F. For *Age Limit*, specify the minimum and maximum age for event participants.

**Note:** To determine whether a registrant, who signs up before an event occurs, meets the age limit criteria, Sphere compares the birth month, day, and year with the event date. When a registrant signs up for an event that has already occurred, Sphere compares the birth month, day, and year with the registration date. When an administrator enters a registration in *Bookkeeping*, Sphere compares the birth year to the event date.

- G. For *Auto-Segmentation*, click the **Click to assign segment** link to open the Registration Type - Auto-Segmentation window, and then select the segment to which you want to associate the event.
- iv. Click **Save** to accept all changes and return to the Participant Registration Information page.

**Note:** The *Registration Levels* field appear at the bottom of the window, showing the registration type you have just configured. It includes links that enable you to make changes to the registration type or delete it, or [configure event registration discounts](#).

- d. Configure Additional Fees as follows:
  - i. Select the **Enable Additional Fee 1** check box if you want to add additional fees to the event registration.
  - ii. For *Label*, enter a name for the new registration fee field that will be added to the registration form.
  - iii. For *Fee*, enter the dollar amount (in USD). Enter the fee without the dollar sign. You can use the decimal point.
  - iv. For *Question to be displayed on form*, type a question that will be displayed on the form.
  - v. Repeat these steps if you want to add another fee.
  - vi. Click **Add Additional Fees**.
- e. Configure Create Custom ID for Registrants as follows:
 

Click **Go**.



**Note:** The *Edit Custom ID for Participants* window opens, enabling you to [configure the custom ID for participants](#) of the event. Each time a participant registers for the event, Sphere will assign an ID to the registration form to enable you to easily determine the number of participants who registered for the event.

- f. After you configure the fee structure, [configure the event's front page](#).

### ► Configure discounts for an event registration

Use this procedure to configure discounts for an event registration. You must first create [discount codes](#), and configure [required items](#), [event information](#), and [fee structure](#) for the event.

1. In the *Event Website Creation Checklist* page, click **Discount** for registration type in the *Registration Level* field.
2. In the *Discount Information* page, perform the following steps:
  - a. For *Name*, enter a name for the discount.
  - b. For *Description*, enter a brief description for the discount.
  - c. For *Quantity Available*, enter a quantity.
  - d. For *Valid From*, click the Calendar to select when the time period for the discount. .
  - e. For *Discount Based on*, make your selection as follows:
    - Click **Discount Code** if you want to
    - Click **Benefit** if you want to apply a discount.
  - f. For *Discount Value*, make your selection as follows:
    - Click **Amount** if you want to specify a specific dollar amount to be discounted from the registration fee.
    - Click **Percentage** if you want the discount to be based on a percentage amount of the registration fee.
3. Click **Add**.
 

The *Current discounts for this registration type* field appears, showing the new discount you have just created. if you need to make changes, click **Edit** and then make and save your changes. If you want to remove the discount, click **Delete** and confirm that you want to delete the discount.
4. Click **Close** to exit the *Discount Information* page and return to the *Website Creation Checklist* page.

### ► Configure a custom ID for event registration

Use this procedure to configure a custom ID for event registration. Each time a participant completes and submits a registration form for an event, Sphere will automatically assign the form a number to enable you to quickly determine the number of participants who registered for the event. You determine which number to start with.

1. In the *Edit Custom ID for Participants* window, make your selection as follows:
  - Click **Do not create Custom ID for Participants** if you do not want Sphere to assign a number to a registration form when a participant registers for an event.
  - Click **Option 1:** if you want Sphere to assign a number to each registration form a participant

completes and submits. Configure Option 1 as follows:

- a. For *Starting ID Number*, enter the first number you want Sphere to use (for example, 001).
  - b. Select the **Include custom participant ID in email confirmation and login HQ** check box if you want Sphere to include the starting ID number in confirmation E-mails sent to the participant.
  - c. For *Customize the label next to the ID in*, enter a label.
  - d. For Registration Type, select the check box for each registration type you want to have the participating ID.
- Click **Option 2**: if you want Sphere to assign a number to a registration form based on the [registration type/level](#). Configure Option 2 as follows:
    - a. For *Registration Starting Number Type*, enter a number.
    - b. Select the **Include custom participant ID in email confirmation and login HQ** check box if you want Sphere to include the starting ID number in confirmation E-Mails sent to the participant.
    - c. For *Customize the label next to the ID in*, enter a label.

2. Click **Submit**.

## Configure front page customization

Use this procedure to configure a front page.

1. In the *Event Website Creation Checklist* page, click **Front Page Customization** in *Required Items*.

**Note:** If you use the Essential Design Templates, click **Website Design**.

**Note:** Use the Breadcrumb to display the checklist, if necessary.

2. Customize the front page as follows:
  - a. [Select a color for the menu bar](#).
  - b. [Select a color for the text in the menu bar](#).
  - c. [Select a color for the header](#).
  - d. [Select a color for the subheader](#).
  - e. [Select the number of graphics to include in the header, and include the graphics](#).
  - f. [Select the number of sponsor graphics in the event page, and include the graphics](#).
  - g. [Select the number of buttons to include on the page](#).
  - h. [Specify whether to include a counter that updates for each donation received](#).
  - i. [Add a logo in the header](#).
  - j. [Add header and subheader text in a page](#).
  - k. [Import a main graphic in the page](#).
  - l. [Add text to the event page](#).

3. Click **Save**.
4. Configure [event text](#).

► **Select a color for the menu bar of a Thon event page**

Use this procedure to select a color for the menu bar for a Thon event page.

1. In the *Front Page Customization* page, click the color box under **Menu**. The color settings window appears.
2. In the color settings window, move the mouse pointer over the color palette and preview the colors in the menu bar.
3. Click the color you want. The color value is added to the *Hex Value* text box.
4. Click **Select**.

► **Select the color for the text in the menu bar of a Thon event page**

Use this procedure to select the color for the text in the menu bar of a Thon event page.

1. In the *Front Page Customization* page, click the color box under **Menu Text**. The color settings window appears.
2. In the color settings window, move the mouse pointer over the color palette, and preview the colors in the menu bar.
3. Click the color you want. The color value is added to the *Hex Value* text box.
4. Click **Select**.

► **Select the color for the header in a Thon event page**

Use this procedure to select a color for the header in a Thon event page.

1. In the *Front Page Customization* page, click the color box under **Header**. The color settings window appears.
2. In the color settings window, move the mouse pointer over the color palette, and preview the color in the preview box for header colors.
3. Click the color you want. The color value is added to the *Hex Value* text box.
4. Click **Select**.

► **Select the color for the subheader in a Thon event page**

Use this procedure to select a color for the subheader in a Thon event page.

1. In the *Front Page Customization* page, click the color box under **Header**. The color settings window appears.
2. In the color settings window, move the mouse pointer over the color palette, and preview the color in the preview box for subheader colors.
3. Click the color you want. The color value is added to the *Hex Value* text box.

4. Click **Select**.

► **Select the number of graphics in the header of a Thon event page**

Use this procedure to select the number of graphics in the header of a Thon event page.

**To select the number of graphics**

1. In the *Front Page Customization* page, perform the following steps:
  - a. For *Header Graphics*, select the number of graphics you want to include.
  - b. Click **Add Header Graphic #**.
  - c. In the window that appears, perform the following steps:

For *Select a local image*, click **Browse** to search for and select the image you want to use.

For *Name the image*, enter a name for the image. .

For *Select an image folder*, select the location in Sphere where the image will be stored.

Click **Submit**.

The window shows a preview of the image, includes its location in the *Image File* field, and shows the location where it will be stored in *Images Folder*. Additionally, the image will be listed in *Accounts Images* so you can quickly select it later.

Click **Submit**.

**To remove an image you have selected**

1. In the *Front Page Customization* page, click the image.
2. In the window that appears, click **Remove**.

**To quickly add an image**

**Note:** Use this procedure if you already have images in Accounts Images.

1. In the *Front Page Customization* page, click **Add Header Graphic #**.
2. In the window that appears, perform the following steps:

For *Account Images*, select the image you want to use.

Click **Submit**.

► **Select the number of sponsor graphics in a Thon event page**

Use this procedure to select the number of sponsor graphics in a Thon event page.

**To select the number of sponsor graphics**

1. In the *Front Page Customization* page, perform the following steps:
  - a. For *Sponsor Graphics*, select the number of graphics you want to include.
  - b. Click **Sponsor Graphic #**.
  - c. In the window that appears, perform the following steps:

For *Select a local image*, click **Browse** to search for and select the image you want to use.

For *Name the image*, enter a name for the image. .

For *Select an image folder*, select the location in Sphere where the image will be stored.

Click **Submit**.

The window shows a preview of the image, includes its location in the *Image File* field, and shows the location where it will be stored in *Images Folder*. Additionally, the image will be listed in *Accounts Images* so you can quickly select it later.

Click **Submit**.

### To remove an image you have selected

1. In the *Front Page Customization* page, click the image.
2. In the window that appears, click **Remove**.

### To quickly add an image

**Note:** Use this procedure if you already have images in Accounts Images.

1. In the *Front Page Customization* page, click **Sponsor Graphic #**.
2. In the window that appears, perform the following steps:

For *Account Images*, select the image you want to use.

Click **Submit**.

### ► Select the number of buttons on a Thon event page

Use this procedure to select the number of buttons to display on a Thon event page, and customize the buttons by selecting the functions that will be performed when visitors click the buttons.

1. In the *Front Page Customization* page, perform the following steps:
  - a. For *Buttons*, select the number of buttons you want to add.
  - b. For each button you add to the event page, customize the button as follows:

Select the function you want the button to perform (for example, open a registration page, a login page, event information page, and so on).

### To remove a button from the event page

- In the *Front Page Customization* page, select **0** for *Buttons*.

### ► Specify whether to include a donation counter in a Thon event page

Use this procedure to specify whether to include a counter that updates with each donation receive, so that you can get immediate feedback regarding your event goals.

1. In the *Front Page Customization* page, perform the following steps:

For *Show Donation Scroll*, select **Yes**.

In the donations text box, enter the text you want show before the donation amount (for example, Total Donations). The text you enter will become a field in Sphere.

### ► Add a logo in the header of a Thon event page

Use this procedure to add a logo in the header of a Thon event page.

1. In the *Front Page Customization* page, click **Add Logo**.
2. In the window that appears, perform the following steps:
  - a. For *Select a local image*, click **Browse** to search for and select the image you want to use.
  - b. For *Name the image*, enter a name for the image.
  - c. For *Select an image folder*, select the location in Sphere where the image will be stored.
  - d. Click **Submit**.

The window shows a preview of the image, includes its location in the *Image File* field, and shows the location where it will be stored in *Images Folder*. Additionally, the image will be listed in *Accounts Images* so you can quickly select it later.

3. Click **Submit**.

### ► Add header and subheader text in a Thon event page

Use this procedure to add text in the header and subheader of a Thon event page.

1. In the *Front Page Customization* page, perform the following steps:
  - a. For **Header**, enter the text you want to appear in the header.
  - b. For **Subheader**, enter the text you want to appear in the subheader.

### ► Import a main graphic in a Thon event page

Use this procedure to import a main graphic in the Thon event page.

1. In the *Front Page Customization* page, click **Import a main graphic**.
2. In the window that appears, perform the following steps:
  1. For *Select a local image*, click **Browse** to search for and select the image you want to use.
  2. For *Name the image*, enter a name for the image.
  3. For *Select an image folder*, select the location in Sphere where the image will be stored.
  4. Click **Submit**. The window shows a preview of the image, includes its location in the *Image File* field, and shows the location where it will be stored in *Images Folder*. Additionally, the image will be listed in *Accounts Images* so you can quickly select it later.
3. Click **Submit**.

### ► Add text to a Thon event page

Use this procedure to add text in a Thon event page.

- In the *Front Page Customization* page, in *Body* enter the text you want to appear in the body of the event page.

## Configure event text

Use this procedure to configure text for different areas on the event page so they have more meaning to you on the event page. This is different from the text you entered when you configured the event's front page.

1. In the Event Website Creation Checklist page, click **Event Text** in *Required Items*.
2. In the Event Text page, perform the following steps:
  - a. [Configure Event Definitions](#).
  - b. [Configure an Organization's Tax Information in an event page](#).
  - c. [Configure Participation Waiver/Agreement](#).
  - d. [Configure Simple and Advanced Registration Confirmation Text](#).
  - e. [Configure Custom PDF Donation Receipt Text](#).
  - f. [Configure Request a Team Text](#).
  - g. [Configure Simple and Advanced Donor Thank You Confirmation](#).
  - h. [Configure Simple and Advanced Booth Registration Confirmation Text](#).
  - i. [Configure Spread the Word](#).
  - j. [Configure Goal Achievement Notification](#).
  - k. [Configure About your Organization Page](#).
  - l. [Configure About your Event Page](#).
  - m. [Configure Pledge Offline Donation Form Instructions](#).
  - n. [Configure Participant Donation Statistics Page Text](#).
  - o. [Configure Volunteer Registration Description Text](#).
  - p. [Configure Simple and Advanced Volunteer Thank You Confirmation](#).
  - q. [Configure Coach's Corner/Information](#).

### ► Configure event definitions

Use this procedure to define the terms that you use in your events. If your terms are the same as those used in Sphere, no changes are necessary.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Event Definitions*, enter the appropriate information for each field.

**Note:** For the *Enter Custom Header Text* field, enter the text that you want to appear in the header of the event page. You can insert HTML tags such as a line break, for example, to separate lines of text. To do it, select the tag from *Insert Tags in Custom Header*, and then click **Insert in Header** to place the tag in the text box.

- b. If you want to add additional options to a donation form that will be printed, perform the following

steps:

- i. For *Printable Donation Form Link*, enter a label for the link. This link will appear in the participant's Tools area within their personal headquarters.
- ii. For *Printable Donation Form Additional Options*, make your selection as follows:
  - A. Select the **Generate Printable Donation Form as a PDF file** check box if you want to create a custom PDF file.
  - B. Select the **Generate PDF files in landscape orientation** if you want the page orientation for the printed donation form to be landscape.
  - C. Select **Show an ID number for the participant** if you want to include an ID in the PDF file.
  - D. Click **Show Alternate Participant ID** if you want to Custom ID you configured in Fee Structure to be displayed on the form, click Show Participant ID if you want the Participant ID that Sphere generates to be displayed on the donation form.
  - E. For the *For Internal Use Only Box* field, make your selection as follows:
    1. Select the **Show an ID number for the participant** check box if you want show an ID number.
    2. Select the **Generate checksum digit** check box if you want generate a checksum digit.
    3. Select the **Generate barcode** if you want the ID to be generated as a barcode.
  - F. Select the **Include link to printable donation form on the participant page** check box if you want to include a link to the printable donation form.
- iii. The *Printable Donation Form Address Information* should already be populated with your contact information in the CRM database. If not, enter it or make changes as necessary. You can include HTML tags in the text box.
- iv. In *Printable Donation Form Additional Information*, type any additional information you would like to add to the printable form.
- c. Click **Save**.
- d. Configuration an organization's tax information.

#### ► Configure your organization's tax information in an event page

Use this procedure to include your organization's tax information in an event page. Enter the tax information so that your donors and supporters can use their E-mail confirmations for your year-end tax documentation. This statement should include a statement that your organization is 501c3 (or other affiliation) and the ID number, if available.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.



- a. For *Organization's Tax Information*, enter your organization's tax information.
- b. Click **Save**.
- c. [Configure waiver/agreement for event participants](#).

#### ► **Configure waivers or agreements for event participants**

Use this procedure to include waivers or agreements for participants of an event, if you have legal information to which participants must agree. If you leave it blank, the waiver page will not appear on the event site.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For Participant Waiver/Agreement, enter (or paste) the waiver or agreement.
- b. Click **Preview** to open the Participant Waiver window and view the waiver/agreement.
- c. Click **Close** to return to the Event Text page.
- d. If you have multiple registrations for this event, enter or paste the waiver/agreement in **Additional Agreement Statement for Multiple Registrations**.
- e. Click **Save**.
- f. Configure [registration confirmation text](#).

#### ► **Configure simple and advanced registration confirmation text**

Use this procedure to add additional text to the Sphere default registration confirmation E-Mail sent to a participant, after the participant registers for an event. You can add the additional text to the Registration Confirmation Text and Details text box (simple confirmation), or use Advanced Confirmation Setup to further customize the confirmation text. The Web site address to participant's personal page and contact information is automatically added to the confirmation page.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Simple Confirmation Setup*, enter (or paste) the confirmation text you want to add to the default registration text.
- b. Click **Preview** to open the Confirmation window and preview the text. Click **Close** when done.
- c. Click **Save** for *Registration Confirmation Text and Details*.
- d. Configure [Custom PDF Donation Receipt](#) text.

#### **To configure advanced registration confirmation text**

1. In the Event Text page, click **Advanced Confirmation Setup** for *Registration Confirmation Text and Details*.
2. In the confirmation setup window that appears, click **Use Advanced Confirmation Setup**.
3. Click **Edit** for *Registration Confirmation*.
4. In the Manage Event Confirmation Emails window, perform the following steps:

- a. For *Confirmation Text Setup*, make your selection as follows:
  - i. Click **Use Account Default Text** if you want to use the Sphere default confirmation E-Mail text..
  - ii. Click **Use Customized Text** if you want to use your own text, and then perform the following steps:
    - A. Click **Edit Email** to open the Content Editor, and then type your registration confirmation text.
    - B. Complete the **Subject Line** text box.
    - C. Verify the information in the **From Name**, **Reply To**, and **From Email** text boxes are accurate.
    - D. Click **Save** in the Content Editor.
    - E. Click the arrow for *Return to the previous page*.
    - F. Confirm that you have saved your changes.
  - iii. In the Manage Event Communication Emails window, select the **Enable this type of confirmation email for this initiative** check box.
  - iv. Preview the confirmation text by clicking the **HTML** or **Text** link. Close the preview window when done.
  - v. Click **Save** in the Manage Event Confirmation Emails window.
  - vi. Click the arrow for *Return to the previous page*.
  - vii. In the confirmation setup window, verify that the Enabled field for *Confirmation Email Type* you have configured contains a check mark.
  - viii. Close the confirmation setup window.
5. In the Event Text page, click **Save** for *Registration Confirmation Text and Details*.
6. Configure [Custom PDF Donation Receipt](#) text.

#### ► Configure custom PDF donation receipt text

Use this procedure to configure the text that will appear on donation receipts, if you have enabled PDF receipts. This procedure is a continuation of the [event text configuration](#) set up for a Thon event page.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the *Event Text* page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Custom PDF Donation Receipt Text*, enter (or paste) the text you want to be displayed on printable donation receipts, after a participant registers for a Thon event.
- b. Click **Save**.
- c. Configure [Request a Team](#) text.

#### ► Configure request a team text

Use this procedure to create the text that appears on the site if you require participants to request a team when they register for a Thon event. This procedure is a continuation of the [event text configuration](#) set up for a Thon event page.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Request a Team*, enter (or paste) the text you want to be displayed.
- b. Click **Preview** to open the Confirmation window and preview the text the participant will see in the confirmation E-Mail.
- c. Click **Save**.
- d. Configure [simple and advanced Donor Thank You](#) text.

#### ► Configure simple and advanced donor Thank You confirmation text

Use this procedure to add additional text to the Sphere default Thank You confirmation E-mail sent to a participant, after the participant registers for an event. You can add the additional text to the Donor Thank You text box (simple confirmation), or use Advanced Confirmation Setup to further customize the confirmation text. The text appears on the Web page and in an E-mail after a participant makes a donation. Add a special Thank You for the donation, or add text regarding how the donations are used.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Simple Confirmation Setup*, enter (or paste) the confirmation text you want to add to the default registration text.
- b. Click **Preview** to open the Confirmation window and preview the text. Click **Close** when done.
- c. Click **Save** for *Donor Thank You*.
- d. Configure [Booth Registration Confirmation](#) text.

#### To configure advanced donor Thank You confirmation text

1. In the *Event Text* page, click **Advanced Confirmation Setup** for *Donor Thank You*.
2. In the confirmation setup window that appears, click **Use Advanced Confirmation Setup**.
3. Click **Edit** for *Donation Confirmation*.
4. In the *Manage Event Confirmation Emails* window, perform the following steps:
  - a. For *Confirmation Text Setup*, make your selection as follows:
    - i. Click **Use Account Default Text** if you want to use the Sphere default confirmation E-mail text.
    - ii. Click **Use Customized Text** if you want to use your own text, and then perform the following steps:
      - A. Click **Edit Email** to open the Content Editor, and then type your registration confirmation text.
      - B. Complete the **Subject Line** text box.
      - C. Verify the information in the **From Name**, **Reply To**, and **From Email** text boxes are

accurate.

- D. Click **Save** in the Content Editor.
- E. Click the arrow for *Return to the previous page*.
- F. Confirm that you have saved your changes.
- iii. In the *Manage Event Communication Emails* window, select the **Enable this type of confirmation email for this initiative** check box.
- iv. Preview the confirmation text by clicking the **HTML** or **Text** link. Close the preview window when done.
- v. Click **Save** in the Manage Event Confirmation Emails window.
- vi. Click the arrow for *Return to the previous page*.
- vii. In the confirmation setup window, verify that the Enabled field for *Confirmation Email Type* you have configured contains a check mark.
- viii. Close the confirmation setup window.
5. In the *Event Text* page, click **Save** for *Donor Thank You*.
6. Configure [Booth Registration Confirmation](#) text.

#### ► Configure simple and advanced booth registration confirmation text

Use this procedure to add additional text to the Sphere default booth registration confirmation E-mail sent to a participant, after the participant registers signs up for booth space at an event. You can add the additional text to the Booth Registration Confirmation Text and Details text box (simple confirmation), or use Advanced Confirmation Setup to further customize the confirmation text. If you have booth registration for your event, add rules and instructions here. The text will appear in the booth confirmation page and in E-mails. If you leave it blank, the booth confirmation section will not appear on the Web site.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Simple Confirmation Setup*, enter (or paste) the confirmation text you want to add to the default registration text.
- b. Click **Preview** to open the Confirmation window and preview the text. Click **Close** when done.
- c. Click **Save** for *Booth Registration Confirmation Text and Details*.
- d. Configure [Spread the Word](#) text.

#### To configure advanced booth registration confirmation text

1. In the *Event Text* page, click **Advanced Confirmation Setup** for *Registration Confirmation Text and Details*.
2. In the confirmation setup window that appears, click **Use Advanced Confirmation Setup**.
3. Click **Edit** for *Booth Registration Confirmation*.
4. In the *Manage Event Confirmation Emails* window, perform the following steps:

a. For *Confirmation Text Setup*, make your selection as follows:

- Click **Use Account Default Text** if you want to use the Sphere default booth registration confirmation E-mail text.
- Click **Use Customized Text** if you want to use your own text, and then perform the following steps:
  - i. Click **Edit Email** to open the Content Editor, and then type your booth registration confirmation text.
  - ii. Complete the **Subject Line** text box.
  - iii. Verify the information in the **From Name**, **Reply To**, and **From Email** text boxes are accurate.
  - iv. Click **Save** in the Content Editor.
  - v. Click the arrow for *Return to the previous page*.
  - vi. Confirm that you have saved your changes.
- In the Manage Event Communication Emails window, select the **Enable this type of confirmation email for this initiative** check box.
- Preview the confirmation text by clicking the **HTML** or **Text** link. Close the preview window when done.
- Click **Save** in the *Manage Event Confirmation Emails* window.
- Click the arrow for *Return to the previous page*.
- In the confirmation setup window, verify that the Enabled field for *Confirmation Email Type* you have configured contains a check mark.
- Close the confirmation setup window.

5. In the *Event Text* page, click **Save** for *Booth Registration Confirmation Text and Details*.

6. Configure [Spread the Word](#) text.

### ► **Configure Spread the Word text**

Use this procedure to compose a message that enables visitors to send the event site to friends and family, in essence spreading the word about the event. Compose the subject line and text that will be included in their E-Mail messages.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

a. For Spread the Word, perform the following steps:

- i. For *Subject Line*, enter the subject line for the message.
- ii. For *Message*, enter your message in the text box.

b. Click **Preview** to open the Spread the Word window and preview your message. Click **Close** when

done.

- c. Click **Save** for *Spread the Word*.
- d. Configure [Goal Achievement Notification](#).

### ► Configure goal achievement notification

Use this procedure to configure goal achievement percentages for your event participants, and then create a notification message to encourage them. Add the goal achievement percentage at which you would like them to be notified, then add E-mail text to inspire them to keep going.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Goal Achievement Notification*, perform the following steps:
  - i. For *Percentage of goal to reach for notification*, enter the percentage amount that, once reached, will cause the notification message to be sent to event participants (for example, 50).
  - ii. For *Notification Subject Line*, enter the subject line for the message that will be sent to participants.
  - iii. For *Notification Message*, enter the message.
- b. Click **Preview** to open the Goal Achievement Notification window and preview your message. Click **Close** when done.
- c. Click **Save** for *Goal Achievement Notification*.
- d. Configure [About Your Organization Page](#).

### ► Configure About Your Organization page

Use this procedure to configure the About your Organization page for an event. Use this page to describe your organization (for example, its mission, goals, and how the event participant can help your organization to accomplish its mission).

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *About your Organization Page*, enter your About information in the text box.
- b. Click **Preview** to open the About Your Organization window and preview your message. Click **Close** when done.
- c. Click **Save** for *About your Organization Page*.
- d. Configure [About your Event Page](#).

### ► Configure About your Event page

Use this procedure to configure the About your Event page. Use this page to describe the event and how the event participant are helping to make a difference.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *About your Event Page*, enter your Event information in the text box.
- b. Click **Preview** to open the About Your Organization window and preview your message. Click **Close** when done.
- c. Click **Save** for *About your Organization Page*.
- d. Configure [Pledge Offline Donation Form Instructions](#).

#### ► Configure pledge offline donation form instructions

Use this procedure to configure text that will appear on a pledge donation form. Use this page to write instructions that tell participants what to do with their check and cash donation they have entered in their headquarters.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Pledge Offline Donation Form Instructions*, enter your text that is to appear on pledge donation forms.
- b. Click **Preview** to open the Pledge Offline Donation Form Instructions window and preview your message. Click **Close** when done.
- c. Click **Save** for *Pledge Offline Donation Form Instructions*.
- d. Configure [Participant Donation Statistics Page Text](#).

#### ► Configure participants donation statistics page text

Use this procedure to configure text that will appear in a Thon event page. This procedure is a continuation of the [event text configuration](#) set up for a Thon event page.

1. In the *Event Text* page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Participants Donation Statistics Page Text*, enter your text that is to appear on the page.
- b. Click **Preview** to open the Participants Donation Statistics Page Text window and preview your text. Click **Close** when done.
- c. Click **Save** for *Participants Donation Statistics Page Text*.
- d. Configure [Volunteer Registration Description Text](#).

#### ► Configure volunteer registration description text

Use this procedure to configure text that will appear at the top of a volunteer registration page for an event. After a participant registers for an event, the text will appear in the confirmation page and E-mails.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Volunteer Registration Description Text*, enter your text that is to appear on the volunteer registration page.
- b. Click **Save**.
- c. Configure [simple and advanced volunteer Thank You](#) text

#### ► Configure simple and advanced volunteer Thank You text

Use this procedure to add additional text to the Sphere default volunteer registration confirmation E-mail sent to a participant, after the participant registers for a Thon event. You can add the additional text to the Volunteer Thank You text box (simple confirmation), or use Advanced Confirmation Setup to further customize the confirmation text. This procedure is a continuation of the [event text configuration](#) set up for a Thon event page.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

1. For *Simple Confirmation Setup*, enter (or paste) the confirmation text you want to add to the default registration confirmation text.
2. Click **Preview** to open the Confirmation window and preview the text. Click **Close** when done.
3. Click **Save** for *Volunteer Thank You*.
4. Configure [Coach's Corner/Information](#).

#### To configure advanced volunteer Thank You text

1. In the *Event Text* page, click **Advanced Confirmation Setup** for *Volunteer Thank You*.
2. In the confirmation setup window that appears, click **Use Advanced Confirmation Setup**.
3. Click **Edit** for *Volunteer Registration Confirmation*.
4. In the *Manage Event Confirmation Emails* window, perform the following steps:
  - a. For *Confirmation Text Setup*, make your selection as follows:
    - i. Click **Use Account Default Text** if you want to use the Sphere default volunteer Thank You confirmation E-Mail text.
    - ii. Click **Use Customized Text** if you want to use your own text, and then perform the following steps:
      - A. Click **Edit Email** to open the Content Editor, and then type your registration confirmation text.
      - B. Complete the **Subject Line** text box.
      - C. Verify the information in the **From Name**, **Reply To**, and **From Email** text boxes are accurate.
      - D. Click **Save** in the Content Editor.



- E. Click the arrow for *Return to the previous page*.
- F. Confirm that you have saved your changes.
- iii. In the Manage Event Communication Emails window, select the **Enable this type of confirmation email for this initiative** check box.
- iv. Preview the confirmation text by clicking the **HTML** or **Text** link. Close the preview window when done.
- v. Click **Save** in the *Manage Event Confirmation Emails* window.
- vi. Click the arrow for *Return to the previous page*.
- vii. In the confirmation setup window, verify that the Enabled field for *Confirmation Email Type* you have configured contains a check mark.
- viii. Close the confirmation setup window.
- 5. In the *Event Text* page, click **Save** for *Volunteer Thank You*.
- 6. Configure [Coach's Corner/Information](#).

#### ► Configure coach's corner/information

Use this procedure to configure text that will appear in the Coach's Corner area on the page.

1. In the Event Text page, perform the following steps:

**Note:** To display the Event Text page, use the Breadcrumb to display the checklist, and then click **Event Text** in *Required Items*.

- a. For *Coach's Corner/Information*, enter your text that is to appear.
- b. Click **Preview** to open the Coach's Information Disclaimer window and preview your message. Click **Close** when done.
- c. Click **Save** for *Coach's Corner/Information*.
- d. Configure [Thon Event Customization](#).

## Configure event customization

1. In the event page, highlight the event and select **Website Info**. The Event Website Creation Checklist page appears.
2. Configure Event Customization in the checklist as follows:
  - a. [Configure Event Schedule](#).
  - b. [Configure Website Features](#).
  - c. [Configure Image and Text Library for Page Customization](#).
  - d. [Configure Email Center Templates](#).
  - e. [Configure Sponsor Information](#).
  - f. [Configure Credits and Debits](#).

- g. [Configure Donor Giving Levels and Participant Incentives.](#)
- h. [Configure Quiz.](#)

**Note:** When you successfully configure Event Customization, each subarea will include a checkmark in the checklist.

### ► Configure event schedule

Use this procedure to schedule an event, if the event has multiple activities starting and ending at different times.

1. In the Event Schedule page, perform the following steps:

**Note:** To display the Event Schedule page, use the Breadcrumb to display the checklist, and then click **Event Schedule** in *Event Customization*.

- a. For *Begin Date/Time*, click the Calendar to select the event's start date, and then select the time of day when the event is to start.
- b. For *End Date/Time*, click the Calendar to select the event's end date, and then select the time of day when the event is to end.
- c. Select **Do Not Display Time** if you do not want to display the time on the event page.
- d. For *Description*, enter a brief description.
- e. Click **Add Event Schedule Items**. The schedule is added to the list

### ► Configure Web site features

1. Display the Website Features page.

**Note:** To display the Website Features page, use the Breadcrumb to display the checklist, and then click **Website Features** in *Event Customization*.

2. Configure Menu Items Modules as follows:
  - a. Configure Custom Menu Links.
  - b. Configure Home.
  - c. Configure Main Navigation Headers.
  - d. Configure Participation Registration.
  - e. Configure Sponsor a Participant.
  - f. Click **Allow General Team Donations**.
  - g. Configure Login.
  - h. Configure Volunteer Registration.
  - i. Configure General Donation.
  - j. Configure Booth Registration.
  - k. Configure Sponsorship Opportunities.
  - l. Configure Auction Registration.
  - m. Configure Opportunity Drawing.

- n. Configure Poll.
  - o. Configure ECommerce Catalog.
  - p. Configure FAQs.
  - q. Configure About Us.
  - r. Configure Event Information.
  - s. Configure View Our Sponsors.
  - t. Configure Awareness Quiz.
  - u. Configure Federal Election Law Compliance Form.
3. Configure Event Modules as follows:
- a. Configure Event Teams.
  - b. Configure Allow Multiple Registration per Transaction.
  - c. Configure Join as a Individual.
  - d. Configure Event Central.
  - e. Configure Knowledge Game.
  - f. Configure Pledge Entry Tool.
  - g. Click **Honor Roll**.
  - h. For **Spread The Word**, select the check box if you want to disable Spread the Word on the event page.
  - i. Configure Credit Card Options.
4. Click **Save**.

#### ► Add custom menu links in a Thon event site

Use this procedure to add custom menu links to an event site, if the information you want site visitors to access does not reside in Sphere. For example, you may want to add a custom menu link to your organization's Web site so that visitors can quickly return to your organization's Web site.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, click **Add/Edit/View Custom Menu Items** for *Custom Menu Link*.
4. In the *Add Custom Menu Items* window, perform the following steps:

- a. For *Menu item name*, enter the name of the link as it will appear in the sidebar of the event site. It will be listed under the heading titled *Information*.
- b. For *Menu item link*, enter the path (URL) to the document, Web page, or other item that will open when a visitor clicks the custom link (for example, <http://www.myorganization.com>).

**Note:** When site visitors click the menu link you specified, the page will open in the current browser window.

- c. Select the **Make menu item like a pop-up window instead of a link** check box if you want the document, Web page, or other item to open in a separate browser window.
  - d. Click **Add**. The menu item will be added to the bottom of the page.
  - e. Add as many menu links as you need.
  - f. Close the window when done.
5. Click **Save** in the *Website Features* page.
  6. Click **Webinfo Checklist** in the Breadcrumb.
  7. Verify that **Website Features** contains a check mark.
  8. [Update and preview](#) the event site.
  9. In the event page, click the newly created custom menu link located under the *Information* heading in the left sidebar on the page to make sure the page, document, or other item opens properly.

#### ► Enable smartphone detection for an event site

Use this procedure to enable smartphone detection for a Thon event site.

**Note:** This feature is currently only available for Thon events.

#### Prerequisites

- You have administrator access to the account or Virtual Account
- The Thon event site is already created and you can access it

<b>Starting point:</b>	<p>You are logged into the account or Virtual Account as administrator.</p> <p>The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Event Customization*, click **Website Features** to open the *Website Features* page.
3. Under **Detect and forward Mobile Devices to Mobile Forms**, select the check boxes for **Mobile Donation Form**, and **Mobile Home Page and Mobile Registration Form**. The **Mobile Donation Form** checkbox is selected by default for all new Thon event sites.
4. Under *Donation Buttons*, specify the donation levels for the mobile form buttons. Donation level amounts appear as buttons on mobile phones to make them easier for users to select. On registration forms, the buttons appear in the *Additional Donations* section. On donation forms they appear under **Select Amount**. Select:

- **Use event donor giving levels** to use the event's donation levels. If necessary, click **Configure** to define the event levels.
- **Use custom buttons** to use custom amounts that are specific to the mobile form, and then enter the amount to appear for each button. You can enter amounts for up to seven buttons. For example, enter custom amounts when the minimum donation amount you accept is lower for the mobile form.

**Note:** Buttons do not appear if you do not configure event levels or enter values for custom buttons.

5. Click **Save** to update the event site and to refresh the *Webinfo Checklist* page.
6. Click **Webinfo Checklist** in the [Breadcrumb](#).
7. Verify that **Website Features** contains a check mark.
8. Click **Update Your Event Now**.
9. Confirm the site update.

#### To disable smartphone detection

1. Click **Detect and forward Mobile Devices to Mobile Donation Form** to remove the check mark.
2. Perform steps 5 to 8 above.

#### ► Enable volunteer registration in a Thon event site

Use this procedure to enable volunteer registrations in a Thon event site. When you enable volunteer registration, the *Volunteer Registration* link will be added to the event page. You will have the option to change the link's name.

#### Prerequisites

- The Thon event site is [created](#)
- Volunteer positions are [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, make the following selections:
  - a. Select the check box for **Volunteer Registration**. The [Volunteer Registration Options](#) table helps you to determine what options to select.
  - b. For *Redefine menu link name*, accept the default name for the volunteer registration link that will be added to the left sidebar in the event page, or enter a new name for the link (up to how 32 characters).
  - c. For *Age Limit Min/Max*, specify how old participants have to be (in number of years) to work as

event volunteers.

If you do not specify a minimum age, the system will assign 18 years old as the default. To enforce the age requirement, include the *Birth Date* field in the volunteer registration form.

The maximum age limit is 99 years.

- d. For *Allow volunteer to also be a participant*, select the check box if you want volunteers to also participate in the event.
  - e. For *Volunteer Projects*, if you want volunteers to select the specific position they want to hold for the event, select the appropriate check box. If you want to use your own custom volunteer positions, you must first create them.
  - f. Click **Save**.
4. Click **Webinfo Checklist** in the Breadcrumb.
  5. Verify that **Website Features** contains a check mark.
  6. [Update and Preview](#) the event site, and then perform the following steps:
    - a. In the event page, click **Volunteer Registration** (or the name you specified in step 3a) in the Visitors group in the left sidebar on the page.
    - b. Verify that the volunteer positions are what you want.
    - c. Select a position and click **Continue** to view the registration form visitors to your event site will see.
  7. [Launch the event site](#) when you are ready to make it available on the Internet.

#### To turn off/disable volunteer registration in an event

1. In the *Website Features* page, remove the check mark for **Volunteer Registration**.
2. Click **Save**.

#### ► Enable booth registration in a Thon event site

Use this procedure to enable registrations for booths. Vendors (booth registrants) that want to market their products during an event can “rent” a booth. Enabling booth registration allows you to establish a booth rental fee as well as specify the actual value of the booth.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event’s name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, make the following selections:

- a. Select the check box for **Booth Registration**.
  - b. For *Redefine menu link name*, accept the default name for the booth registration link that will be added to the left sidebar in the event page, or enter a new name for the link (up to how 24 characters).
  - c. For *Booth Registration Fee*, enter the fee that will be charged to vendors to rent the booth.
  - d. For *Booth Value*, enter the real value of the booth. You may want to specify this value if you want vendors to know the actual cost for renting the booth.
  - e. Click **Save**.
4. Click **Webinfo Checklist** in the Breadcrumb.
  5. Verify that **Sponsor Information** contains a check mark.
  6. [Update and preview](#) the event site.
  7. In the event page, click **Booth Registration** (or the name you specified for the link) in the Visitors group in the left sidebar on the page to view the *Booth Registration* form.

#### ► Enable sponsorship opportunities in a Thon event site

Use this procedure to enable sponsorship opportunities in an event site so that you can offer and receive sponsorships online.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, make the following selections:
  - a. Select the check box for **Sponsorship Opportunities**.
  - b. For *Redefine menu link name*, accept the default name for the sponsorship opportunity link that will be added to the left sidebar in the event page, or enter a new name for the link (up to 32 characters)
  - c. For *Provide sponsors the option to pay by sending a check in by mail*, select the check box if you want to add this option in the payment section for Sponsors.
  - d. For *Include the sponsorship information in confirmation emails*, select the check box if you want to include sponsor information from your sponsors in the confirmation E-mail they will receive when signing up as a sponsor.
  - e. For *Sponsorship caption*, enter the text that will be displayed in the title section of the event page

when a visitor clicks the sponsorship link in the event site.

- f. Click **Save**.
4. Click **Webinfo Checklist** in the Breadcrumb.
5. Verify that **Website Features** contains a check mark.
6. Click **Sponsor Information** for *Event Customization*. The Sponsor Information page opens.
7. Click **Add New Sponsor Level**.
8. Complete the *Add New Sponsorship Level* window as follows:
  - a. For *Sponsorship Level Name*, enter a name for the sponsorship level (for example, Gold Sponsors, Platinum Sponsors, and so on).
  - b. For *Amount*, enter the minimum amount necessary for the sponsorship level.
  - c. For *Number Available*, specify the number of sponsors allowed within the level.
  - d. For *Sponsorship Benefits*, specify what the giveaway (gift) is for the sponsorship level.

**Note:** If there are no benefits, or if you are not aware of the benefits for this sponsorship level enter None or TBD in this field.
  - e. Select the **Available for Online Sale** check box if you want the sponsor level to be displayed on the Web site.
  - f. Select the **Show this level on View Our Sponsors** check box if you want this sponsorship level visible on your *View Our Sponsor* page. Otherwise, it will only be available in Sphere.
9. Click **Webinfo Checklist** in the Breadcrumb.
10. Verify that **Sponsor Information** contains a check mark.
11. [Update and preview](#) the event site.
12. In the event page, click **Sponsorship Opportunities** (or the name you specified in step 3b) in the Visitors group in the left sidebar on the page.
13. Verify that the **Sponsorship Opportunities** event page contains your sponsorship information.
14. [Activate the event site](#) when you are ready to make it available on the Internet.

#### ► Configure social media website features

Use this procedure to integrate your organization's social media accounts with a Thon event site. You can include social media feeds and sharing tools. If you do not configure the features to use your organization's accounts, the site uses Blackbaud's by default.

**Note:** You must use the Essential Design Templates to configure social media features.

#### Prerequisites

- A thon event site is already [created](#).
- A Facebook page is already created and a new app for the event site is [configured](#).
- A Twitter page is already created and a new widget for the event site is [configured](#).
- A ShareThis publisher account is already [configured](#).
- A YouTube account is already created.



<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*. The *Website Features* page appears.
3. Under *Event Social Media*, complete the social media fields.
  - a. Under *Facebook*, specify the integration details to share a home page feed and personal page comments section on the Thon site with the event's Facebook page.
    - i. For *Link to profile or page*, enter the link to the event Facebook page.
    - ii. For *Facebook AppID*, enter the app ID you created in Facebook to link the sites.
    - iii. For *Facebook Feed Title*, enter text to appear above the Facebook feed on the Thon home page.
    - iv. For *Facebook Comments Title*, enter text to appear above the Facebook comments section on personal pages.
    - v. To hide Facebook features, select from the checkboxes as follows:
      - To hide the Facebook feed on the home page and comments section on personal pages, select **Hide Facebook**.
      - To hide the Facebook comments section on personal pages and keep the feed on the homepage, select **Hide comments on personal pages**.
      - To hide the *Like* button on personal pages, click **Hide like button**.
      - To hide the Facebook feed on the home page and keep the comments section on personal pages, select **Hide home page Facebook feed**.
  - b. Under *Share Page*, specify the integration details for ShareThis. ShareThis enables you to link your account to social media websites so you can analyze sharing data after users share content from your Thon events.
    - i. For *Share Page Services*, enter the names of the social media services to which the ShareThis account is linked. Enter the names in lowercase letters and separate them with commas. For example, enter facebook, twitter, pinterest. The icons for the services you list appear with the ShareThis icon on the event site web pages.
    - ii. For *Share Page AppID*, enter the pub key from your organization's ShareThis account.
    - iii. For *Share Page Widget Title*, enter text to appear above the social media site icons to which the ShareThis account is linked.
    - iv. To hide the ShareThis section on the home page, select **Hide Share Page**.
  - c. Under *Twitter*, specify the integration details to display the event's Twitter feed on the Thon site's home page.

- i. For *Twitter Account*, enter the username for the event's Twitter account.
 

**Note:** If you do not include the username, the link in the header section of the event's Twitter feed links to Blackbaud's account.
- ii. For *Twitter Widget Title*, enter text to appear above the Twitter feed on the home page.
- iii. For *Twitter Widget Script*, paste the HTML from the **Copy and paste the code into the HTML of your site** section of the Create a user widget page on the Twitter website.
- iv. To hide the Twitter feed on the home page, select **Hide Twitter**.
- d. Under *YouTube*, specify the integration details to display a YouTube video on the Thon site's home page.
  - i. For *Link to YouTube Channel*, enter the event's or organization's YouTube channel URL.
  - ii. For *YouTube Widget Title*, enter text to appear above the YouTube video on the home page. The text appears as a link to the YouTube channel URL.
  - iii. For *YouTube Video Embed Code*, enter the IFrame embed code from the YouTube video. The embed code appears after you click **Share > Embed** on the YouTube video page.
4. Click **Save**.
5. Click **Webinfo Checklist** in the Breadcrumb.
6. Verify that **Website Features** includes a check mark.
7. Update the event and preview the site as follows:
  - a. In the *Event Website Creation Checklist* page, click **Preview** for *Actions*.
  - b. Click **Publish This Event Now**.
  - c. Confirm that you want to publish changes to the website.
  - d. For *Web address*, click **Go**.

#### ► Configure a Facebook app for a Thon event site

Use this procedure to create an app to integrate with a Thon event site. After you create the app, specify the details in the *Website Features* section of the Thon. The app integrates a home page feed and personal page comments section on the Thon site with the event's Facebook page. If you do not configure a Facebook app to use your organization's Facebook account, the site uses Blackbaud's by default.

**Note:** You must use the Essential Design Templates to use the Facebook app on a Thon site.

#### Prerequisites

- A thon event site is already [created](#).
- A Facebook account is already created for the organization or event.

<b>Starting point:</b>	You are logged into Facebook.
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#### Create a Facebook developer account:

1. Enter **developer** in the Facebook search bar.
2. Select **Developer** in the *Apps* section of the list that appears. The Facebook Developers page appears.

**Note:** You can also click <https://developers.facebook.com> while you are logged into your Facebook account to access the Facebook Developers page.

3. If you are not already registered as a developer, click **Register as a Developer** and complete the necessary steps. For information about how to register as a developer, see the Facebook online help.

**Note:** Facebook requires you to verify the account with a mobile phone number or a credit/debit card.

### Configure Facebook app

1. From the Facebook Developers page, click **Create New App**.
2. In the screen that appears, enter a name in the *App Name* field.
3. Click **Continue**.
4. Complete the security check in the screen that appears.
5. Click **Continue**. The configuration screen appears.
6. Enter **kintera.org** in the *App Domains* field.
7. Enter the URL of the Thon event site in the *Website with Facebook Login* field.
8. Click **Save Changes**.
9. Enter the app information in the *Event Social Media* section of the Thon *Website Features* page. For information about how to configure the fields see Configure social media website features on page 36.

### ► Configure a Twitter widget for a Thon event website

Use this procedure to create a Twitter widget to integrate with a Thon event site. After you create the widget, add the HTML code Twitter generates to the *Website Features section* of the Thon. The widget integrates a home page feed on the Thon site with the event's Twitter page.

**Note:** You must use the Essential Design Templates to use the Twitter app on a Thon site.

### Prerequisites

- A thon event site is already created
- A Twitter account is already created for the organization or event

<b>Starting point:</b>	You are logged into Twitter.
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1. Click the Twitter account settings icon and select **Settings**. The Account page appears.
2. Click **Widgets**. The Widgets page appears.
3. Click **Create new**. The Create a user widget page appears.

**Note:** To use an existing widget, click **Edit** next to its name.

4. Review the configuration details, preview the timeline, and update the settings as necessary.
5. Click **Create widget**.
6. Copy the HTML from the **Copy and paste the code into the HTML of your site** section.
7. Enter the widget information in the **Event Social Media** section of the Thon *Website Features* page. For information about how to configure the fields, see [Configure social media website features](#).

► **Configure a ShareThis account for a Thon event site**

Use this procedure to create a ShareThis account to integrate with a Thon event site. ShareThis enables you to link your account to social media websites so you can analyze sharing data when users share content from your Thon events.

After you create the account, enter the details in the *Website Features* section of a Thon to enable icon links to the social media websites on the event site. If you do not configure a ShareThis account to use your organization's account, the site uses Blackbaud's by default.

**Note:** You must use the Essential Design Templates to use ShareThis analytics on a Thon site.

**Prerequisites**

- A thon event site is already [created](#).

<b>Starting point:</b>	You are logged into ShareThis.com.
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**Create an account and link to social media sites:**

1. Click **Publishers** in the website navigation.
2. Click **Create an account**. The *Create Account* page appears.
3. Complete the fields to join the site. The *My Account* page appears.
4. Click **Account Settings**. The *Account Settings* page appears.
5. Click **Link** for each social network to which you want the event site to link and complete the profile details as necessary.

**Configure publisher tools**

1. From the *My Account* page, click **Domain Manager**. The *Domain Manager* page appears.
2. Click **Add New Domain**.
3. Enter **kintera.org** in the *Domain* field.
4. Click **Save**.
5. Enter the account information in the *Event Social Media* section of the *Thon Website Features* page. For information about how to configure the fields see *Configure social media website features* on page 36

**Note:** You will need the Pub Key from the *My Account* page to complete the fields in the *Thon Website Features* page.

► **Enable team registration in a Thon event site**

Use this procedure to enable team registration in a Thon event site. Enabling team registration allows you to collect donations and registration fees (if applicable) from individuals and teams.

**Prerequisites**

- A Thon event site is already [created](#)

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, make the following selections:
4. Select the check box for **Event Teams**.
  - a. Click any of the **User** options for *Event Teams*, or accept the default option. See [Team Registration Options in Thon Event Sites](#) for more information regarding the *Event Teams* options.
  - b. Select the check box for **Show the ranking of top teams**. This box will display on the homepage and show the top five teams.
  - c. Select the check box for **Show Team Pages**. Web site visitors will be able to view team pages.
  - d. Select the check box for **Allow Team Registration**. This allows registrants to actually register for teams on the Web site.
  - e. For *Team Member Limit*, specify the number of people (participants) that can join each team. Specifying the number of participants per team is beneficial for some event types, for example a competition where you only want five people per race teams.
  - f. Click any of the **Allow Team Captains** options to indicate what each team captain will be able to manage.
5. Click **Save**.
6. Click **Webinfo Checklist** in the Breadcrumb.
7. Verify that **Website Features** includes a check mark.
8. Update the event and preview the site as follows:
  - a. In the *Event Website Creation Checklist* page, click **Preview** for *Actions*.
  - b. Click **Publish This Event Now**.
  - c. Confirm that you want to publish changes to the website.
  - d. For *Web address*, click **Go**.
  - e. Confirm that you want to preview the event page.

#### ► Enable multiple registrants/family registration in a Thon event site

Use this procedure to enable users to register multiple participants with one transaction.

##### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, make the following selections:

- a. Select the check box for **Allow Multiple Registrations per Transaction**.
  - b. Select one of the following:
    - Select **Register Multiple People** to enable each person that registers for the event to have a personal page from which they can do their own fundraising. The *Register Multiple People* option will be added to the list of options available when a visitor clicks the *Participant Registration* link (or the name you specified for the link) on the event site.
    - Select **Register a Family** to enable a family or group to share a personal page from which to conduct their fundraising activities. The *Register Family* option will be added to the list of options available when a visitor clicks the *Participant Registration* link (or the name you specified for the link) on the event site.
    - Select **Allow registrant to choose Multiple People of Family registration** to accomplish the above two steps. The *Register Multiple People* and *Register Family* options will be added to the list of options available when a visitor clicks the *Participant Registration* link (or the name you specified for the link) on the event site.
  - c. Click **Save**.
4. Click **Webinfo Checklist** in the Breadcrumb.
  5. Verify that **Sponsor Information** contains a check mark.
  6. [Update and preview](#) the event site.
  7. In the event page, click **Participant Registration** (or the name you specified for the link) in the *Visitors* group in the sidebar on the page.
  8. Verify that the options in the page are what you specified.

► **Enable a mobile fundraising application**

If the custom mobile fundraising app option is enabled for your account, use this procedure to enable it for *Friends Asking Friends* participants to download. When you enable the app, a screen with icon links to the stores that offer it appears during the personal headquarters login process. The icons also appear on the My HQ tab in the personal headquarters.

When you configure the settings, you include links to your app in the Apple App Store and Google Play App Stores, a custom QR code, a title, and a subtitle. Sphere uses the custom app configurations where the mobile app download options are available.

**Note:** We recommend you offer your app in both the Apple App Store and Google Play App Store.

**Prerequisites**

- A thon event site is already [created](#).
- A custom app is created and available in the Apple App Store and Google Play App Stores.
- The custom app option is enabled for your account.

**Note:** To enable a custom app, Blackbaud Support must enable the option for your account.

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*. The *Website Features* page appears.
3. Under **Custom Mobile App**, select the **Use a custom mobile app** checkbox.

**Note:** The Custom Mobile App section appears when the custom app option is enabled for your account. To enable it, contact Blackbaud Support.

4. In the **Link to iOS custom App** field, enter the link to the custom app in the Apple App Store.
5. In the **Link to custom Android App** field, enter the link to the custom app in the Google Play App Stores.
6. In the **Custom QR code** field, enter the link or browse to the location of the two dimensional bar code file for the custom app.
7. In the **Custom App Title** field, enter the name of the custom app. The text appears after the words "Download the" above the options.
8. In the Custom App Subtitle field, enter the text to appear below the custom app title.
9. Click **Save**.
10. Click **Webinfo Checklist** in the Breadcrumb.
11. Verify that **Website Features** includes a check mark.
12. Update the event and preview the site as follows:
  - a. In the *Event Website Creation Checklist* page, click **Preview** for *Actions*.
  - b. Click **Publish This Event Now**.
  - c. Confirm that you want to publish changes to the website.
  - d. For *Web address*, click **Go**.

#### ► Enable CAPTCHA for payment submission

Use this procedure to enable CAPTCHA on Thon ECommerce, registration, and donation forms. CAPTCHA is a simple user test to determine if the user is a computer or a human. Use it as a security measure to prevent spam and other abuse.

#### Prerequisites

- A Thon event site is already [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, select where to enable CAPTCHA.

- To enable CAPTCHA for ECommerce forms on the event site, select the option under **ECommerce Catalog**.
  - To enable CAPTCHA when you accept payments for donations and registrations, select the options under **CAPTCHA for Payment Submission**. CAPTCHA appears on the desktop and mobile versions of the forms you select.
4. Click **Save**.
  5. Click **Webinfo Checklist** in the Breadcrumb.
  6. Verify that **Website Features** includes a check mark.
  7. Update the event and preview the site as follows:
    - a. In the *Event Website Creation Checklist* page, click **Preview** for *Actions*.
    - b. Click **Publish This Event Now**.
    - c. Confirm that you want to publish changes to the website.
    - d. For *Web address*, click **Go**.
    - e. Confirm that you want to preview the event page.

#### ► **Configure image and text library**

Use this procedure to add or remove images for your participants' Web page, and select the default image that will display on the personal page of all participants. The participants will have the option of changing your default image when they create their personal page.

1. Display the Image and Text Library page.

**Note:** To display the page, use the Breadcrumb to display the checklist, and then click **Image and Text Library for Page Customization** in *Event Customization*.

2. For *Select the area to customize*, select the library you want to configure and configure it as follows.
  - a. *Configure Image Library as follows:*
    - i. Click **Manage** images.
    - ii. In the *Manage Event Images* window, perform the following steps:
      - A. Click **Browse** to select the image to import.
      - B. For *Name this image*, enter a name for the image, and then click **Submit**.
      - C. The image will be added to the image list.
    - iii. Click **General Donation Default** if you want the image to be added by default.
    - iv. For *Personal Page*, click **Default** if you want the image to be added to participants' personal pages by default.
    - v. For *Team Page*, click **Default** if you want the image to be added to team pages by default.
    - vi. Click **Finish**. Select *Allow participants to upload their own images for their custom pages* if you want to allow participant to upload their own images.
  - b. *Configure General Donation Text as follows:*



- ii. For *General Donation Page Caption*, enter a caption that will appear on all participant pages.
  - iii. For *General Donation Page Text*, enter a donation message that will appear on all participant pages.
  - iv. For *Add Custom Link on General Donation Page*, perform the following steps:
    - v. For *Custom Link Name*, enter the link name you want to appear on participant pages.
  - c. Configure *Personal Page Text Library*.
  - d. Configure *Team Page Text Library*.
  - e. Configure *Family Page Text Library*.
  - f. Configure *Page Background Library*.
3. Click **Save**.

### ► Set up an E-mail template for a Thon event site

Use this procedure to set up an E-mail template that event registrants can use to send E-mail to their event supporters.

#### Prerequisites

- The Thon event site is [created](#)

**Starting point:** You are logged into Sphere.  
The *Special Events: Kintera Thon Events* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Email Center Templates** under *Event Customization*.
3. In the *Email Center Templates* page, click **Add New Template**.

**Note:** You can add up to 20 templates for an event.

4. In the *Add Email Center Templates* page, perform the following steps:
  - a. For *Template Name*, enter a name for the template.
  - b. For *Email Subject*, enter the information that will appear in the *Subject* line of the recipient's E-mail application.
  - c. For *Highlighted Message*, enter the text that will be displayed as the first line of text in the body of the recipient's E-mail. The text string will be in bold font and centered in the E-mail message.
  - d. For *Email Text*, enter the information that will appear in the body of the E-mail application when recipients receive the E-mail.
  - e. Click **Save**.
  - f. Verify that the new template is added to the templates list.
5. Click **Webinfo Checklist** in the Breadcrumb.
6. Verify that **Email Center Templates** contains a check mark.

7. [Update and preview](#) the event site.
8. Test the template in the Thon event site as follows. If you are not yet registered as an event participant, you must do so in order to test the template.
  - a. In the Thon event site, click **Use Tools** in the side bar. The link is listed under My *HQ*.
  - b. Log in to access your personalized headquarters.
  - c. Click the **Email** tab in the event page.
  - d. In the *Compose Email Message* page, select the appropriate template you want to test.
  - e. Click **Preview Email**.
  - f. Close the preview window when done.

**Note:** Even though you can modify the *Subject*, *Highlighted Message*, and *Body* fields on this page, if you want the changes to be permanent update the template as described in step 4.

#### ► **Configure sponsor information**

Use this procedure to configure sponsor information.

1. Display the Sponsor Information page.

**Note:** To display the page, use the Breadcrumb to display the checklist, and then click **Sponsor Information** in *Event Customization*.

2. In the Sponsor Information page, click **Add New Sponsor Level**.
3. In the Add New Sponsorship Level window, perform the following steps:
  - a. For *Sponsorship Level Name*, enter a name such as Bronze Level, Silver Level, Platinum Level, and so on.
  - b. For *Amount*, enter the dollar amount associated with this level.
  - c. For *Number Available*, enter the number available for this sponsorship level.
  - d. Complete *Sponsorship Benefits*.
  - e. Select the *Available for Online Sale* check box.
  - f. Select the Show this level on View Our Sponsors page check box if you want the sponsorship levels to be displayed on the page.
4. Click **Save**.

#### ► **Set up credits and debits for a Thon event participant**

Use this procedure to set up credits and debits for an event participant. For example, you may want to give credit to a participant for achieving their fundraising goals, or for taking on additional tasks during the event in addition to their fundraising activities. If you provided discount codes for organizations that are paying for their employees and you want to credit their registration totals, provide the credit following the steps in this procedure. Similarly, you may want to debit a participant for not achieving their fundraising goals.

You must first setup credits and debits, and then apply them through Bookkeeping for the event.

#### **Prerequisites**

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon.</b></p>
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### Step 1: Set up credits and debits

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Credits and Debits** under *Event Customization*.
3. In the *Credits and Debits* page, perform the following steps:

- a. For *Step 1*, select **Credit** to set up a credit, or **Debit** to set up a debit.

**Note:** A credit will appear as an increase to the participant's total fundraising amount, and a debit will decrease the total amount.

- b. For *Step 2*, enter a name for the credit or debit item. Use names that are meaningful (for example, Credit for Jane Participant).
  - c. For *Step 3*, specify whether the credit or debit is a fixed amount (static). Select **Yes** for *Static amount* if it is fixed, and then enter the amount. If you select **No**, you will have the opportunity to enter the amount when you apply the credit or debit.
  - d. Click **Save**.
  - e. Verify that the new credit or debit item is added to the bottom of the *Credits and Debits* page.
4. Click **Webinfo Checklist** in the Breadcrumb.
  5. Verify that **Credits and Debits** contains a check mark.
  6. Apply the credit or debit as described below.

### Step 2: Apply credits and debits

1. Click **Kintera Thon** in the Breadcrumb, or select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. Highlight the event's name and then select **Bookkeeping**.
3. Click **Manage Initiative Records**.
4. Verify that the **Participants** option is selected for *Show Me*.
5. Search for the participant, or click **Show All** to view all participants.
6. Locate the participant in the list, and then click **Edit**. The *Edit Participant* page appears, showing fundraising activities for the participant you selected.
7. Select the **Apply/Edit Credits & Debits** tab.
8. In the resulting page, click **Add**.
9. In the pop-up window, select the credit or debit you want to apply.

**Note:** If when you set up the credits and debits you did not specify static amounts, you can enter the amount in the pop-up window.

10. Click **Save**, and then click the link in the pop-up window to update the information and close the window.
11. If applicable, click **Retry** in the message box to return to the *Edit Participant* page.

12. Select the **General Information** tab.
13. Verify that the credit or debit was applied to the participant's total fundraising amount. The entry will be reflected in **Miscellaneous Credits**. A credit will result in an increase to the *Current Balance*, and a debit will result in a decrease to the balance.

► **Configure donor giving levels and participants incentives**

Use this procedure to configure donor giving levels and participant incentives. Configure donor giving levels and gifts, donor designations, participant fundraising incentive levels, and team fundraising incentive levels. Donor giving levels will appear on a participant's personal page, and the participant and team fundraising incentive levels will appear on the Event Information page in the Web site. Donor designations are funds or programs you can setup to which donors can contribute.

1. Display the Donor Giving Levels and Participant Incentives page, and perform the following steps:

**Note:** To display the page, use the Breadcrumb to display the checklist, and then click **Donor Giving Levels and Participant Incentives** in *Event Customization*.

- a. [Configure Donor Giving Levels & Gifts](#).
- b. [Configure Donor Designations](#).
- c. [Configure Participant Fundraising Incentive Levels](#).
- d. [Configure Team Fundraising Incentive Levels](#).

► **Configure donor giving levels and gifts**

Use this procedure to configure donor giving levels and gifts. Donor giving levels will appear on a participant's personal page.

1. In the Donor Giving Levels and Participant Incentives page, make sure the *Donor Giving Levels & Gifts* tab is selected.
2. For *Set minimum donation amount*, enter the minimum amount of dollars that a credit card can be charged.
3. Select the **Apply minimum amount...** check box if you want to apply the minimum amount to any additional amount specified on the registration form.
4. Select the **Hide "\$ Range Min for Gift"...** if you want to hide the minimum range.
5. Select the **Set up recurring payments** check box if you want to enable recurring payments, and then enter the maximum number of payments.
6. Select the **Enable pre-defined payment frequencies** check box to enable setting of pre-define payment frequencies, and then select Monthly, Quarterly, and/or Annually. The date when the donor made the original gift will be used for all subsequent scheduled payments.
7. Click **Save**.
8. Click **Add Donor Giving Level**.
9. In the Add Donor Giving Level window, perform the following steps:
  - a. For *Giving Level Name*, enter a name such as (what?).
  - b. For *General Description*, enter a brief description for the giving level.
  - c. For *Giving Level Range*, enter a range.

- d. Configure Gift Information For Giving Levels as follows:
  - i. For *Gift Name*, enter a name for the gift (for example, Starrbuck's Gift Certificate).
  - ii. For *Gift Description*, enter a brief description for the gift.
  - iii. For *Gift Value*, enter the dollar amount the gift is worth.
  - iv. Click **Import a logo** to [import a logo](#).
- e. Click **Save**.

10. Configure [donor designations](#).

### ► Add donor giving levels to a Thon event site

Use this procedure to add donor giving levels that will appear on all participants' event pages. Donor giving levels enable you to provide default donation levels and to use gifts as incentives for donations. You can associate a gift with a donation level to encourage higher donation amounts.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Donor Giving Levels and Participant Incentives** under *Event Customization*. The *Donor Giving Levels and Participant Incentives* page opens.
3. Click **Add Donor Giving Level**.
4. In the *Add Donor Giving Level* page, perform the following steps:
  - a. For *Giving Level Name*, enter a name for the giving level (for example, Platinum, Gold, Silver, and so on).
  - b. For *General Description*, enter a brief description (for example, Giving level for people who donate \$10,000 or more).
  - c. For *Giving Level Range*, enter the minimum dollar amount expected for the giving level. This giving level range will be displayed on the participants' event page.
 

**Note:** Do not enter a "from this amount to this amount" range in this field (for example, \$100 - \$400). If you do so, the giving level range will default to 0.
  - d. For *Gift Name*, enter a name for the gift the donor will receive for their contribution (for example, T-Shirt, Rolex Watch, and so on).
  - e. For *Gift Value*, enter the dollar amount the gift is worth.
  - f. If you want to import a picture of the gift, click **Import a logo for Image** to select the image you want to use.

**Note:** When you use an image, *Giving Level Name* will become a hyperlink in the participants' event pages. When donors move the mouse cursor over the link they will see the image you selected for the gift. For example, if a gift is a Rolex watch, you may want to have a picture of the watch for donors to see.

- g. Click **Save**. You will return to the *Donor Giving Levels and Participant Incentives* page.
5. Click **Webinfo Checklist** in the Breadcrumb.
6. Verify that **Donor Giving Levels and Participant Incentives** contains a check mark.
7. [Update and preview](#) the event site.
8. In the participants' event pages, verify that the *Donor Giving Levels* are added to the pages. When a donor selects a donor level, the amount will be added to the *Enter Donation Amount Here* field in the event page.

#### ► Configure donor designations

Use this procedure to configure donor designations, which are funds or programs you can set up and to which donors can contribute.

1. In the *Donor Giving Levels and Participant Incentives* page, make sure the **Donor Designations** tab is selected.
2. *Initiative Defaults* shows the funds and donor designations for an event. To change the donor designation, follow the on-screen instructions.
3. For *Donor Designation*, perform the following steps:
  - a. Select the **Enable Donor Designations** check box to enable donor designation, and then click **Select Donor Designations**.
  - b. In the Select Donor Designations to be Displayed, perform the following steps:
    - i. Select the **Fund designation (My Fund Designation)** check box.
    - ii. Click **Save**. The donor designation is added to the list.
4. For *Front End Selection Options*, perform the following steps:
  - a. Click **Allow multiple Designations to be selected** if you want to allow donors to select more than one designation.
  - b. Click **Allow only one Designation to be selected** if you only want donors to select one designation.
  - c. Select the **Require Selection of Designation** check box if you want to make selecting donor designation mandatory on an event page.
  - d. Select the **Display Donor Designation Description** check box if you want to show a description for donor designation on the event page.
5. Click **Save**.
6. Configure [participant fundraising incentive levels](#).

#### ► Configure participant fundraising incentive levels

Use this procedure to configure incentive levels for participant fundraising activities.

1. In the *Donor Giving Levels and Participant Incentives* page, make sure the *Participant Fundraising Incentive Levels* tab is selected.
2. Click **Add Participant Incentive Level**.

3. In the Incentive Level window, perform the following steps:
  - a. For *Incentive Level Name*, enter a name.
  - b. For *General Description*, enter a brief description for the incentive.
  - c. For *Incentive Level Ran \$ Min/Max*, enter the minimum dollar amount in the first text box, and then enter the maximum incentive dollar amount in the second text box.
  - d. Configure Incentive Information as follows:
    1. For *Incentive Name*, enter a name
    2. For *Detailed Incentive Description*, enter a description for the incentive.
    3. For *Incentive Value*, enter the amount of incentive dollars to be paid out.
    4. Click **Save** and then click Retry in the message box that appears.
  - e. Configure [team fundraising incentive levels](#).

#### ► Configure team fundraising incentive levels

Use this procedure to configure incentive levels for team fundraising activities.

1. In the Donor Giving Levels and Participant Incentives page, make sure the *Team Fundraising Incentive Levels* tab is selected.
2. Click **Add Participant Incentive Level**.
3. In the Incentive Level window, perform the following steps:
  - a. For *Incentive Level Name*, enter a name.
  - b. For *General Description*, enter a brief description for the incentive.
  - c. For *Incentive Level Ran \$ Min/Max*, enter the minimum dollar amount in the first text box, and then enter the maximum incentive dollar amount in the second text box.
  - d. Configure Incentive Information as follows:
    - i. For *Incentive Name*, enter a name.
    - ii. For *Detailed Incentive Description*, enter a description for the incentive.
    - iii. For *Incentive Value*, enter the amount of incentive dollars to be paid out.
    - iv. Click **Save** and then click Retry in the message box that appears.

#### ► Add a Quiz game to a Thon event site

Use this procedure to add a Quiz game to a Thon event site. You will first create the game and the questions and answers for the game, then you will determine where on the event site players can access the game, and lastly you will preview and test the game. Use quizzes as an educational tool for your cause or event, to share important facts, or to encourage event participation.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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**Step 1: Create the game, and the questions and answers**

1. Highlight the event's name and then select **Website Info**. The Event Website Creation Checklist page appears.
2. For *Event Customization*, click **Quiz**. The *Quiz* page appears. Notice that a default Quiz is already created.
3. Click **Edit**. The *Edit Quiz* page appears, and the *Game Name* field shows the name of the Quiz game.
4. Complete the event quiz section on the page as follows:
  - a. For *Do you want to display the correct answer to participants*, click **Yes** if you want players to see the correct answer for the questions you ask. Otherwise, select **No**.
  - b. For *Do you want to allow participants to replay*, click **Yes** if you want players to be able to play the game as many times as they want.
  - c. For *Score is cumulative*, select the check box if you want a player's score to be cumulative (for example, if John plays twice, his score from the first and second game will be combined).
  - d. For *Question Time*, specify the amount of time (in seconds) each player has to answer a question. We recommend 20 to 30 seconds.
  - e. For *Quiz Header*, add the headline you want to display in the header of the Quiz form.
  - f. For *Do you want to randomize the questions*, click **Yes** if you want the questions to display by random (they will vary from game to game).
  - g. For *How many questions should be on the quiz*, enter the number of questions the quiz will contain.
  - h. For *Custom Text for Finish Page*, enter a message you want to display on the *Finish* page (regardless of the players' scores).
  - i. Click **Save**.

5. Create questions by completing the *Enter Questions and Answers* section on the page as follows:

- a. For *Type your question here*, enter the quiz question.
- b. For *Answer #*, enter the answers to be displayed in the quiz. You should have one correct answer, and any number of incorrect answers if you want to make the game interesting.
- c. Click the button for the answer you want to be the correct answer.
- d. Click **Add**. The quiz question will be listed at the bottom of the page in the *Review Question in Your Quiz* section. From here, you can make changes or delete the question.

**Note:** You do not have to provide answers in all four answer fields. If your question will result in a Yes or No answer, then you only need to use the first two fields.

**Tip:** Here are some general guidelines for making your quiz fun, educational, and challenging:

- Do not make all the correct answers the first selection (for example, choice A).
- Do not make all the correct answers the first selection (for example, choice A).
- Do not make all the correct answers the first selection (for example, choice A).

6. Add as many questions as you would like. When done, click **Quiz** in the Breadcrumb to return to the *Quiz* page.



7. Verify that the Quiz information is correct. The following figure shows an example games in the Quiz page:

Add Game For This Event									
Game Name:									
		Knowledge MyHQ	Awareness General Page	Awareness Personal Page	Name	Number of Questions	Time per Question	Show Questions	Allow Replay
<a href="#">Edit</a>	<a href="#">Delete</a>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	game #1	1	30	Yes	Yes
<a href="#">Edit</a>	<a href="#">Delete</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	game #2		30	Yes	Yes

8. Determine where the Quiz game will appear in the event site as describe below.

### Step 2: Determine where the Quiz game will appear in the event site

You can include a game in up to three locations on an event page: Knowledge MyHQ, Awareness General Page, and Awareness Personal Page. If you only have one game, it will be included at all three locations.

1. In the *Quiz* page, select: **Knowledge MyHQ**, **Awareness General Page**, or **Awareness Personal Page**. The table below should help you decide which option to choose.

Knowledge MyHQ	Awareness General Page	Awareness Personal Page
Appears within participant Personal Donation Pages	Appears on the main event page	Appears as part of participant Personal Donation Pages
You must select Knowledge Game within Website Features to activate the game. See procedures in step 2 below.	You must select Awareness Quiz within Website Features to activate the game. See procedures in step 2 below.	You must select Awareness Quiz within Website Features to activate the game. See procedures in step 2 below.
Least visibility since a player must be a registered participant, as the player will need to log into his/her personal Donation page.	Highest visibility since the link will appear in the sidebar on the event page, and can be accessed by all site visitors.	Intermediate visibility since a player must be a registered participant, as the player will need to log into his/her personal Donation page.

2. Activate the Quiz game as follows:
  - a. Click **Webinfo Checklist** in the Breadcrumb.
  - b. Click **Website Features**.
  - c. Select the check box for **Awareness Quiz** or **Knowledge Game** depending on your selection in step 1.
  - d. Click **Save**.
3. Click **Webinfo Checklist** in the Breadcrumb.
4. Verify that **Quiz** contains a check mark.
5. View and test the Quiz game in the event page as described below.

Knowledge MyHQ	Awareness General	Awareness Personal Page
----------------	-------------------	-------------------------

	Page	
Appears within participant Personal Donation Pages	Appears on the main event page	Appears as part of participant Personal Donation Pages
You must select Knowledge Game within Website Features to activate the game. See procedures in step 2 below.	You must select Awareness Quiz within Website Features to activate the game. See procedures in step 2 below.	You must select Awareness Quiz within Website Features to activate the game. See procedures in step 2 below.
Least visibility since a player must be a registered participant, as the player will need to log into his/her personal Donation page.	Highest visibility since the link will appear in the sidebar on the event page, and can be accessed by all site visitors.	Intermediate visibility since a player must be a registered participant, as the player will need to log into his/her personal Donation page.

### Step 3: View and test the Quiz game in the event page

1. In the *Event Website Creation Checklist* page, click **Publish Your Event Now**.
2. Confirm that you want to publish changes to the event website.
3. Click **Go**.
4. Click **OK** in the pop-up window to open the event site in a browser window.
  - If you selected to include the game in *Knowledge MyHQ*, the *Play Knowledge Game* link will be added to the *MyHQ* section in the sidebar.
  - If you selected to include the game in *Awareness General Page* or *Awareness Personal Page*, the *Awareness Quiz* link (or link name you specified when you activated the Quiz game) will be added to the *Visitors* section in the sidebar.
5. To test the Quiz game, click the appropriate link in the event page and then play the game. If you selected *Awareness* as the location for the game, you will need to log into your personal headquarters with a user name and password to access the game.

### To edit a Quiz

1. In the Quiz question and answer page, click **Edit** for the question you want to modify.
2. Make the necessary changes and then click **Save**.

### To delete a quiz

**Note:** When you delete a question, you cannot recover it.

1. In the Quiz question and answer page, select the check box for the question you want to delete (remove).
2. Click **Delete**.
3. Confirm that you want to delete the question.

**Note:** You can delete a quiz if the site is activated and is live. You can also modify the questions while the site is live.

### To add additional Quiz games to a Thon event site

1. In the *Quiz* page, perform the following steps:
  - a. For *Game Name*, enter a name for the game.
  - b. Click **Add**. The new Quiz game is added to the Game list.

### ► Configure Add Ons for a Thon event Web site

Use this procedure to configure add-ons in a Thon event Web site.

1. Select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. In the *Special Events: Kintera Thon Events* page, highlight the event and select **Website Info**. The *Event Website Creation Checklist* page appears.
3. Configure *Add Ons* in the checklist as follows:
  - a. [Configure Auction Information](#).
  - b. [Configure Opportunity Drawing Information](#).
  - c. [Configure Poll](#).
  - d. [Set up an online electronic store via eCommerce Create an eCommerce Catalog](#).
  - e. [Customize Forms](#).
  - f. [Configure Participant HQ Settings](#).

### ► Set up an online auction in a Thon event site

Use this procedure to set up online auction functionality in a Thon event site. Auctions help you to raise more money for your fundraising event.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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#### Step 1: Enable auction

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, select the check box for **Auction Registration**.
4. For *Redefine the menu link name*, accept the default name or enter the name of the link as it will appear in the sidebar of the event site. It will be listed under the heading titled *Visitors*.
5. Click **Save**.
6. Click **Webinfo Checklist** in the Breadcrumb.
7. Verify that **Website Features** contains a check mark.
8. Determine how auction items will be organized and displayed in the event site as described below.

**Step 2: Determine how auction items will be organized and displayed in the event site**

1. In the *Event Website Creation Checklist* page, click **Auction Information** under *Add Ons*. The *Auction Information* page appears.
2. For *Catalog Format*, specify how the products will be displayed in the page by selecting one of the options below:

Select **Single page no categories** to show all products in one list, without categories. The figure below shows an example.

Product Name	Quantity Available	Lowest Acceptable Bid	Place Bid
<a href="#">T-shirts</a>	30	\$30.00	<input type="button" value="Bid"/>
<a href="#">Caps</a>	20	\$20.00	<input type="button" value="Bid"/>
<a href="#">Rolex watch</a>	5	\$5000.00	<input type="button" value="Bid"/>
<a href="#">Tennis bracelet</a>	4	\$500.00	<input type="button" value="Bid"/>

Select **Single page with categories** to organize products by category in the event page. The figure below shows two categories (Clothing and Jewelry) and the products in those categories.

Product Name	Quantity Available	Lowest Acceptable Bid	Place Bid
<b>Clothing ( 2 Items )</b>			
<a href="#">T-shirts</a>	30	\$30.00	<input type="button" value="Bid"/>
<a href="#">Caps</a>	20	\$20.00	<input type="button" value="Bid"/>
<b>Jewelry ( 2 Items )</b>			
<a href="#">Rolex watch</a>	5	\$5000.00	<input type="button" value="Bid"/>
<a href="#">Tennis bracelet</a>	4	\$500.00	<input type="button" value="Bid"/>

Select **Category selection page with individual sub-pages** to only show the product categories. The figure below shows an example.

**Catalog Categories**

Clothing	<input type="button" value="Select"/>
Jewelry	<input type="button" value="Select"/>

To view the products within the categories, site visitors will need to click *Select* to display the products for the selected category. The figure below is an example of the page that appears when a visitor clicks *Select*

for the Clothing category:

**Auction Catalog**

**Items in the Clothing Category**

Product Name	Quantity Available	Lowest Acceptable Bid	Place Bid
<a href="#">T-shirts</a>	30	\$30.00	<b>Bid</b>
<a href="#">Caps</a>	20	\$20.00	<b>Bid</b>

3. For *Catalog Style*, select the **Show images in catalog** check box if you want to show a picture (image) of the product. It will appear next to the product's name. The figure below shows an example.

Click on image to view enlarged version

Item	Product Name	Quantity Available	Lowest Acceptable Bid	Place Bid
<b>Clothing ( 2 Items )</b>				
	<a href="#">T-shirts</a>	30	\$30.00	<b>Bid</b>
	<a href="#">Caps</a>	20	\$20.00	<b>Bid</b>
<b>Jewelry ( 2 Items )</b>				
	<a href="#">Rolex watch</a>	4	\$5000.00	<b>Bid</b>
	<a href="#">Tennis bracelet</a>	4	\$500.00	<b>Bid</b>

Notice that an *Item* column has been added. If you uploaded an image, it will be displayed (as shown for T-shirts). If you do not upload an image, the Items column will display *No Image*. You will upload images when you create an auction catalog.

4. Select the **Show number of items in each category** check box if you want to show the number of products in each category. The above figure shows that categories *Clothing* and *Jewelry* each have two items (products).
5. For *Bidder Requirements*, make your selection as follows:
- The *Require credit card* check box is always selected and you cannot change it. All auction purchases must be made using a credit card. When site visitors place a bid, their credit card information will be collected and their credit card will be charged if they win the bid.

- b. Select the **Allow online bidding** check box to enable site visitors to bid on products and to show the *Place Bid* column in the auction page, as shown in the above figure. To place a bid for a product, site visitors will click *Bid* for the desired product.
6. For *Auction End Date/Time*, specify when the date and time when the auction will end.
7. Click **Save**.
8. Click **Webinfo Checklist** in the Breadcrumb.
9. Verify that **Auction Information** contains a check mark.
10. Create an auction catalog and add products to the catalog as described below.

### Step 3: Create an auction catalog and add products to it

1. In the *Event Website Creation Checklist* page, click **Create Auction Catalog** under *Add Ons*. The *Auction Catalog* page opens.
2. Click **New Category**. The *Auction - New Category* page opens.
3. For *Category Name*, enter a name for the category (for example, Clothing, Jewelry, Raffle, and so on), and then click **Save**.

Categories help you to better organize your products, and can be quite useful if you have an extensive list of products. Additionally, categories enable site visitors to easily search for products in your auction catalog.
4. Create as many categories as you need.
5. In the *Auction Catalog* page, click **Add Products**. The *Auction – Add Products* window appears, and the *General Information* tab is in focus.
6. Complete the *General Information* tab as follows:
  - a. For *Name*, enter the product's name (for example, T-shirt, Ball Caps, Tennis Bracelet, and so on).
  - b. For *Description*, enter a brief description.
  - c. For *Details*, provide any details regarding the product. For example, if the product is a T-shirt you could specify whether it is a polo shirt, color options, different sizes available, the type of fabric, and so on.
  - d. For *Features*, describe the features of the product. Using the T-shirt product as an example, you could specify that it has raglan sleeves, crew neckline, short and long sleeve options, artwork design on the back, and so on.
  - e. For **Restrictions**, enter any restrictions for the sale of the item. For example, visitors cannot specify custom T-shirt sizes or the item is not sold in certain States.
  - f. For *Customer Product Code*, enter any discount code you want to apply to the item. Discount codes must already be set up.
  - g. For *Picture URL*, click **Select Image** if you want to add an image (picture) of the product on the event page so that site visitors can see the product before placing their bids.
  - h. For *Condition*, describe the shape the product is in (for example, new, old, previously owned, and so on).
7. Select the **Auction Information** tab, and complete it as follows:

- a. For *Minimum Bid*, enter the amount of dollars you want bidding to start. This is usually the price of the item being auctioned and is the lowest acceptable bid.
  - b. For *Bid Increment*, enter the amount of dollars the bid will increase for each new bid. The system will automatically increment the bid amount by this amount. New bids must be greater than the current bid, and are dependent on the price of the item being auctioned. For example, if the minimum bid is \$30 and the bid increment is \$5, and assuming the first bid was \$30, the next bidder must bid \$35 or more (in \$5 increments).
  - c. For *Quick Sale Price*, enter an amount if you want visitors to be able to bid on the product immediately. This price must be greater than the minimum bid amount.
  - d. For *Reserve Bid*, enter the bids in case your primary bidder is unable to purchase the product. Reserve bids are not allowed if the product quantity is greater than one.
  - e. For *Acquisition Cost*, enter any expense incurred for the acquisition of the item. This field is not required.
  - f. For *Tax Value*, enter the fair market value of the product. The value appears in the email confirmation website users receive after they bid on the product. The value is necessary if the bidder wins the auction and claims a charitable contribution deduction with their taxes. Note that this value is independent of the State sales tax where the purchase is made.
  - g. For *Volunteer Solicitor*, and if applicable, select the name of the volunteer who secured this donation. This allows you to give the volunteer credit for the transaction.
  - h. For *Product Donor*, select the organization or individual that is donating the products being auctioned.
  - i. For *Auction Type*, specify the type of auction (for example, silent, Web site, in person, and so on).
8. Select the **Shipping and Inventory Information** tab, and complete it as follows:
    - a. For *Available Quantity*, enter the number of products that will be available for bidding (for example, the number of T-shirts).
  9. Select the **Advanced** tab, and complete it as follows:
    - a. For *Front end vs Back End display*, specify whether the product will be selectable from the event site or the Sphere user interface (Sphere Only). If you select the *Sphere Only* check box, you can view the product in Sphere, and it will not be available for purchase via the Web site.
    - b. If you plan to associate a product with a segment, select the segment in *Auto Segmentation*. Segments must already be created in Sphere.
    - c. For *Product Category*, select the category where you want the product to appear. See the figures in *Step 2: Determine how auction items will be organized and displayed in the event site* for examples.
  10. Click **Save**. The *Auction Catalog* page opens, showing the products and the categories to which they are assigned.
  11. Create as many products as you need.
  12. Click **Webinfo Checklist** in the Breadcrumb.
  13. Verify that **Create Auction Catalog** contains a check mark.
  14. [Update and preview](#) the event site in a browser window as described below.

#### Step 4: Update the event site and preview it in a browser window

1. In the *Event Website Creation Checklist*, click **Publish This Event Now**.
2. Confirm that you want to publish changes to the website.
3. Verify that **Preview** is selected for *Actions*.
4. For *Web Address*, click **Go**.
5. Confirm that you want to preview the event site. The Web site opens in a browser window.
6. Click the **Auction Registration** link you created in *Step 1: Enable auction*.
7. Preview the page to make sure it is what you want.

**Note:** Until you open the auction for bidding, Quantities Available and Lowest Acceptable Bid will display N/A. Additionally, the Bid button will be disabled. Once you open the auction for bidding, these fields will show their accurate data, and the Bid button will be available for selection.

8. Close the browser window.
9. Open the auction for bidding as described below.

#### Step 5: Open the auction for bidding

1. In the *Event Website Creation Checklist*, click **Auction Information** under *Add Ons*. The *Auction Information* page opens.
2. Click **Start Auction**. The message Auction is Open will display on the page.

**Note:** You can temporarily suspend (pause) an auction to prevent site visitors from being able to bid on products. The Quantities Available and Lowest Acceptable Bid will display N/A, and the Bid button will be disabled in the event site. This is different from ending an auction, which permanently terminates the action, notifies winners, as well as charge their credit cards for the purchase. You will not be able to restart the auction.

#### ► Create an Opportunity Drawing in a Thon event site

Use this procedure to add opportunity drawing functionality (an online lottery of prizes) to a Thon event site. An opportunity drawing is an effective way to raise money, by selling tickets for a drawing that has a prize. Visitors to the event site may purchase tickets (essentially be assigned numbers). When the drawing takes place, you can post the winning numbers on the site and/or notify the winners via E-mail.

**Note:** Site visitors do not need to register for an event to purchase tickets. However, they will need to complete a contact form so that they may enter their contact information.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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#### Step 1: Enable Opportunity Drawing

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, select the check box for **Opportunity Drawing**.



4. For *Redefine the menu link name*, accept the default name or enter the name of the link as it will appear in the sidebar of the event site. It will be listed under the heading titled *Visitors*.
5. Click **Save**.
6. Click **Webinfo Checklist** in the Breadcrumb.
7. Verify that **Website Features** contains a check mark.
8. Set up the Opportunity Drawing as described below.

## Step 2: Set up the Opportunity Drawing

1. In the *Event Website Creation Checklist* page, click **Opportunity Drawing Information** under *Add Ons*. The *Opportunity Drawing Information* page opens.
2. Complete *Opportunity Drawing Text* as follows:
  - a. For *Drawing Name*, enter the name of the lottery (for example, Trip to Hawaii).
  - b. For *Drawing Date*, click the calendar icon to select the date when the drawing will be held. This is the date when the lottery numbers will be decided.
  - c. For *What terminology do you want to use for your opportunity drawing?*, enter the key terms regarding this lottery that you want to appear throughout the event site (for example lotto, tickets, prizes, and so on).

**Note:** This terminology will appear in one of the names in the columns that are displayed when assigning Tickets to specific individuals on the Web site.

3. Complete *Maximum Purchase Option* as follows:
  - a. For *Maximum items per Purchase*, specify the largest dollar transaction you are willing to accept from purchasers of tickets.
4. Complete *Reassign Number Option* as follows:
  - a. Click **On** if you want to reassign the lottery numbers to other people (for example, friends and family). Otherwise, click **Off**.

After the transaction is processed, the numbers assigned to each purchased ticket are displayed. You can assign the *Tickets* to specific individuals by changing the name in the text boxes.

Click **Update** to save the changes.

5. Complete *State Options on Registration forms* as follows:
  - a. In the box on the left, select the **States** that will appear in the registration form. You can select multiple States by pressing the Ctrl key on the keyboard while selecting the States.  
  
By selecting the states that will appear on the form visitors complete to purchase tickets, you are informing them that only the individuals residing in those states are eligible to participate in the Opportunity Drawing.
  - b. Click **Add** to copy the selected states to the box on the right.
  - c. Click **Update State Options** to save the changes.
6. Complete *Pricing Categories Information* as follows and as shown in the table below:
  - a. For *Pricing Category Name*, enter a name for the ticket item (for example, Individual ticket).
  - b. For *Quantity*, first enter the number of tickets and then the total price.

Pricing Category Name	Quantity	Price (\$)
Individual ticket	1	\$1

- c. Click **Update** to save your changes.
- d. Create as many pricing categories as you need (for example, Roll of 10 tickets, A book of 100 tickets, and so on). See the table below for an example.

Pricing Category Name	Quantity	Price (\$)
Individual ticket	1	\$1
Roll of tickets	10	\$10
Book of 100 tickets	100	\$100

- e. Verify that **Create Pricing Categories** shows the information you have entered.
7. Complete *Ticket Roll Information* as follows:
    - a. For *Starting Number*, enter the starting number for the first set of tickets.
    - b. For *Number of Tickets*, enter the total number of tickets in the set and then select one of the following options:
      - Select **Create Tickets with Sequential Numbers** if you want the tickets to be distributed in sequence. For example, the first person to buy a ticket will have ticket number 1 (if this was your starting number). The next person would receive #2, and so on. If a third person purchases a group of 10 tickets, the person will receive ticket # 3 to 12.
      - Select **Create Tickets Sequentially then Shuffle them**, if you want the tickets to be randomly distributed. For example, the first person to buy a ticket may have ticket number 8 instead of 1.
  8. Click **Update** to save your changes.
  9. Verify that **Create Ticket Rolls for Drawing** shows the information you have entered. It will also show the total number of tickets sold and remaining.
  10. Create as many sets as you need following the above steps.
  11. Click **Webinfo Checklist** in the Breadcrumb.
  12. Verify that **Opportunity Drawing Information** contains a check mark.
  13. Add prizes to the opportunity drawing as described below.

### Step 3: Add prizes to an Opportunity Drawing

1. In the Event Website Creation Checklist, click Opportunity Drawing Prizes. The *Prize Information for Opportunity Drawing* page opens.
2. Complete the page as follows:
  - a. For *Prize Name*, enter a name for the prize (for example, Trip for 2 to Hawaii).
  - b. For *Description*, enter a brief description (for example 3 nights 2 days all expenses paid).
  - c. For *Picture URL*, if you want to add an image (picture) of the prize on the event page so that site visitors can see the prize before purchasing their tickets, click Select Image and then perform the following steps:

- i. In the *Insert an Image* window, click **Browse** to locate the image.
  - ii. Click **Submit Image**.
- Picture URL will show a thumbnail of the image for you to preview.
- d. For *Quantity*, enter the number of prizes available.
- e. For *Individual Prize Value*, enter the value of the prize. Enter only numbers in this field.
3. Click **Add New Prize**.
4. Verify that **Existing Prizes for this Drawing** shows the information you entered.
5. Create as many prizes as you need following the above steps.
6. Click **Webinfo Checklist** in the Breadcrumb.
7. Verify that **Opportunity Drawing Prizes** contains a check mark.
8. [Update and preview](#) the event site in a browser window as described below.

#### Step 4: Update the event site and preview it in a browser window

1. In the *Event Website Creation Checklist*, click **Publish This Event Now**.
2. Confirm that you want to update the event.
3. Verify that **Preview** is selected for *Actions*.
4. For *Web Address*, click **Go**.
5. Confirm that you want to preview the event site. The Web site opens in a browser window.
6. Click the **Opportunity Drawing** link you created in *Step 1: Enable opportunity drawing*.
7. Preview the page to make sure it is what you want.

#### ► Set up a poll in a Thon event site

Use this procedure to add Poll functionality to your Thon event site. A poll is a survey that you conduct to get the opinions of your constituents.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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#### Step 1: Enable poll in a Thon event site

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, select the check box for **Poll**.
4. For *Redefine the menu link name*, accept the default name or enter the name of the link. This link will appear in the sidebar of the event site, and will be listed under the heading titled *Visitors*.
5. Click **Save**.

6. Click **Webinfo Checklist** in the Breadcrumb.
7. Verify that **Website Features** in the *Event Website Creation Checklist* page contains a check mark.
8. Set up the poll as described below.

### Step 2: Set up a poll

1. In the *Event Website Creation Checklist* page, click **Poll** under *Add Ons*. The *Poll Questions* page opens.
2. Click **New**. The *Edit Poll* page opens.
3. Complete the page as follows:
  - a. For *Type your question here*, enter your poll question.
  - b. For *Options*, enter the options that Web site visitors will be able to select. The options will be displayed in the event page in the order they appear here
  - c. Add as many answers as you need by clicking **New Option**.
  - d. Click **Save**. The *Poll Questions* page opens, showing your new poll question.
  - e. Create as many questions as you need following the above steps.
4. Activate the poll questions, as described below, for your site visitors to access.

### Step 3: Activate poll questions

1. In the *Poll Questions* page, click the radio button for the poll question you want to activate. You can only activate one poll question at a time.
2. Update the site and preview it in a browser window as described below.

### Step 4: Update the event site and preview it in a browser window

1. Click **Webinfo Checklist** in the Breadcrumb.
2. Verify that **Poll** contains a check mark.
3. In the *Event Website Creation Checklist*, click **Publish This Event Now**.
4. Confirm that you want to publish changes to the website.
5. Verify that **Preview** is selected for *Actions*.
6. For *Web Address*, click **Go**.
7. Confirm that you want to preview the event site. The Web site opens in a browser window.
8. Click the **Poll** link you created in *Step 1: Enable poll in a Thon event site*.
9. Preview the page to make sure it is what you want.

### ► Set up an online electronic store via eCommerce in a Thon event site

Use this procedure to add an electronic store to your event site using eCommerce. You will create an eCommerce catalog to hold your products, which you can organize by categories.

### Prerequisites

- The Thon event site is [created](#)
- Segments must be created if you plan to associate a product with a segment
- Benefits must be created if you plan to use them
- Tokens must be created if you plan to use them

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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#### Step 1: Enable eCommerce in an event site

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
3. In the *Website Features* page, select the check box for **Ecommerce Catalog**.
4. For *Redefine the menu link name*, accept the default name or enter the name of the link as it will appear in the side bar of the event site. It will be listed under the heading titled Visitors.
5. For *Enable CAPTCHA when you accept payments for ECommerce*, select the check box to enable a simple user test on the payment form to determine if the user is a computer or a human.
6. Click **Save**.
7. Click **Webinfo Checklist** in the Breadcrumb.
8. Verify that **Website Features** contains a check mark.
9. Create an eCommerce catalog as described below.

#### Step 2: Create an eCommerce catalog

1. In the *Event Website Creation Checklist* page, click **eCommerce Catalog** under *Add Ons*. The eCommerce Catalog page opens.
2. Create product categories as follows:
  - a. Click **New Category**. The *New Category* page opens. Complete the page as follows:
    - b. For *Category Name*, enter a name for the category (for example, Clothing, Jewelry, Raffle, and so on).  
  
Categories help you to better organize your products, and can be quite useful if you have an extensive list of products. Additionally, categories enable site visitors to easily search for products in your catalog.
    - c. For *Category Location*, click **Select**.
    - d. In the resulting window, highlight **Store Directory** and then select **Make a Subcategory**. The window will close and then the words *Under 'Store Directory'* will be added to the *Category Location* field.
    - e. Select the **Add category image** check box if you created a picture (image) that you want to use to

represent the category. For example, if you created a category named Clothes, you could add a picture of a garment. To add the image, perform the following steps:

- i. Click **Select Image** and then add the image. A thumbnail of the image you select will be added to the image box so that you can preview the image to make sure it is what you want.
- f. Select the **Remove category text** link check box if you want the categories identified only by image and not with a text link. If you select this check box, you must also select the Add category image check box.
- g. Click **Save**. The ECommerce Catalog page opens, showing the new category you created and where it is stored.
- h. Create as many categories as you need.

**Note:** When you create additional categories after creating the first one, you will have the option to place new categories above or below an existing category to create subcategories, or place all categories at the same level in the Store Directory.

3. Create an attribute library for products to which you will add an additional fee. For example, if the price for a T-shirt is \$10 and you want to charge an additional \$5 for extra large sizes, you could create an Additional Sizes attribute and then specify the additional cost that will be assessed (for example, Extra Large is \$5 more; Big and Tall is \$10 more, and so on). Perform the following steps to create an attribute library.
  - a. In the *Ecommerce Catalog* page, click **Attribute Library**. The *eCommerce Attributes* window opens.
  - b. Click **Create Attribute** group.
  - c. In the resulting window, perform the following steps:
    - i. For *Attribute Name*, enter a name for the attribute (for example, Color).
    - ii. For *Attribute Data Type*, select the type of data entry the attribute will allow (for example, selection from a check box or radio button).
    - iii. For *Required*, click **Yes** or **No** to indicate whether the field is required.
    - iv. Click **Save**.
    - v. Verify that the new attribute is added to the list of attributes.
  - d. Click **Add option** for the attribute you created, and perform the following steps in the resulting window:
    - i. For *Option*, enter the first option for the attribute. Using the Color attribute as an example, an option could be Teal.
    - ii. For *Price*, enter the additional price purchasers will pay to buy the Teal colored product (for example, a Teal T-shirt). You may enter decimal points (for example 15.99).
    - iii. Click **Save**.
    - iv. Verify that the new attribute option is added to the new attribute.
    - v. Create as many attribute options as you need.
    - vi. Click **Close Window** in the *eCommerce Attribute* window when done.
4. In the *Ecommerce Catalog* page, add products to product categories as follows:
  - a. Highlight a product category and then select **Add Product**. The *eCommerce – Add Product* window appears, and the *General Information* tab is in focus.

b. Complete the *General Information* tab as follows:

- i. For *Name*, enter the product's name (for example, T-shirt, Ball Caps, Tennis Bracelet, and so on).
- ii. For *Description*, enter a brief description.
- iii. For *Details*, provide any details regarding the product. For example, if the product is a T-shirt you could specify it is a polo shirt with different color options, available sizes, the type of fabric, and so on.
- iv. For *Features*, describe the features of the product. Using the T-shirt product as an example, you could specify that it has raglan sleeves, crew neckline, short and long sleeve options, artwork design on the back, and so on.
- v. For *Restrictions*, enter any restrictions for the sale of the item. For example, visitors cannot specify custom T-shirt sizes or the item is not sold in certain States.
- vi. For *Customer Product Code*, enter any internal code you want to use. This is not required.
- vii. For *Picture URL*, click **Select Image** if you want to add a image (picture) of the product on the event page so that site visitors can see the product before placing their bids.
- viii. For *Product Attributes*, the list of attributes you defined in step 3 above will be listed in the Product DOES NOT have these attributes list box. Select an attribute and click **Add** to move it to the *Product HAS these attributes* list box.
- ix. For *Thumbnail Picture*, click **Select Image** if you want to add a picture of the product on the event page so that site visitors can immediately see what they are buying. Thumbnail images load quickly on the event page because the file size is usually less than 90 x 90 pixels.
- x. For *Large Picture*, click **Select Image** if you want to add a larger picture of the product on the event site. Because a thumbnail picture is small, it is not possible to view all of the details of a product. By adding a large picture, site visitors can click on the product's link to view a product image that is approximately 400 x 400 pixels or smaller. Of course, the quality of the image site visitors will see depends on the actual image you have added.

c. Select the *Payment Information* tab, and complete it as follows:

- i. For *Unit Price*, select one of the following options:  
 Select **Simple Price**, enter the price being charged for the product.  
 Select **Scaled Pricing** if you want to give site visitors an incentive to buy more products. For example, the price for one T-shirt is 10, but the price for 10 to 20 T-shirts is \$8 each (a discount of \$2 per item).
- ii. For *Late Fee date*, click the calendar icon to select a date when the fee for the product will increase with a late charge.
- iii. For *Late Fee penalty*, enter the amount of money that will be added to the Unit Price if the product is purchased after the Late Fee date.
- iv. If you do not want the price of the product to be displayed on the event site, select the **Do not display the price of this product in the store** check box.
- v. For *Product Tax Deductible Value*, enter the product's charitable contribution value. This is the amount purchasers can claim for tax purposes. The field and the value display in the online confirmation, and can also be inserted into advanced confirmation E-mails.

**Note:** If you enter a product tax deductible value, we recommend you configure an advanced confirmation and insert the *Product Tax Deductible* field into the message so that purchasers can use the E-mail as a receipt.

- vi. For *Apply product sales tax*, select one of the following options:  
Click **Product is NOT taxable** if you do not plan to add a sales tax to the product.  
Click **Product is taxable** if you plan to add a sales tax to the product. Sphere uses the *Shipping Address* state to apply the state sales tax you enter for the store.
- d. Select the *Shipping and Inventory Information* tab, and complete shipping options for the product as follows:
  - a. Select the **Requires shipping** check box if the product will be shipped to purchasers.
  - b. For *Product Shipping Weight (in pounds)*, enter the weight of the product.
  - c. For *Flat fee Shipping / Handling Costs*, enter any fees your organization will charge to ship the product to the buyer.
  - d. For *Quantity*, make your selection as follows:  
Enter the number of products that will be available for sale, or select the Unlimited check box.  
  
Select **Turn on wait list form ...** check box to allow purchasers to complete a form that will allow them to be added to a wait list if the Quantity you specified is reached. Once you update the Quantity, the purchaser will be notified via E-mail that the product is available for purchase.  
  
Select **Send me an alert email...** when the Quantity is reached so that the owner of the Thon event site can take action to update the Quantity when more products become available for purchase.  
  
Select **Enable Product Download** if you want to provide a downloadable message to your purchasers, and then select one of the following options:
    - Click **File Selected** and then click **Select File** to locate and insert the file.
    - Click URL or externally hosted file and then enter a name for the file.
- e. Select the **Discounts** tab, and complete it as follows:

**Note:** You must have discounts created for this event list first.

  - i. Select the check box for the discount you want to apply.
  - ii. Click **Save**.
- f. Select the **Benefits** tab, and complete it as follows:
  - i. Select one of the following options:

**Note:** Benefits must already be set up in the Benefits Library.

  
Click the first **No option** radio button if you do not want purchasers to customize their benefits package. Benefits will not be displayed.  
  
Click the second **No option** radio button if you want purchasers to customize their benefits package.



Click **Allow selection with check boxes** if you want purchasers to be able to select more than one product.

Click **Forces selection with radio buttons** if you only want purchasers to select one product at a time.

Click **Forces selection with dropdown menus** to allow purchasers to select a product from a list of products.

- ii. Select the check boxes for the benefits you want to appear on the event page, and in the *Quantity* text box specify the number of benefits available for each
- g. Select the **Advanced** tab, and complete it as follows:
  - i. For *Front end vs Back End display*, specify whether the product will be selectable from the event site or the Sphere user interface (Sphere Only). If you select the Sphere Only check box, the product will be selectable via the eCommerce catalog in Sphere.
  - ii. If you plan to associate a product with a segment, select the segment in Auto Segmentation. Segments must already be created in Sphere.
  - iii. For *Product Category*, select the category where you want the product to appear.
  - iv. For *Token*, select the token benefit and then specify the number of tokens.
  - v. Click *Configure Related Products* if you want to include related products links with each product, and then complete the fields in the *Related Products* window.
- h. Click **Save**. You will return to the ECommerce Catalog page. Expand a category to view the products added to that category.
  - i. Add as many products as you need to as many categories as you want.

5. Specify layout options as described below.

### Step 3: Specify eCommerce layout options

1. In the Ecommerce Catalog page, click Layout Options. The eCommerce Form Options page opens.
2. Specify how products will be organized and displayed in the event site by setting display options as follows:
  - a. Click **Standard category listing** to show products by categories (for example, if you created a category named Clothing, you could organize all clothing-related products in that category). Or click **Single page without categories** to show all products in one list, without categories.

The following figure shows an example of the information presented on the event page when you select *Standard category listing*. Notice that the categories are listed first, and below the categories are all products within the categories.

Store Directory	
Category Name	
<a href="#">Clothing</a>	
<a href="#">Food</a>	

Kintera's Featured Products			
<a href="#">Fruit Baskets</a>	<a href="#">T-shirt</a>	<a href="#">Pants</a>	<a href="#">Chocolate</a>
Delicious fruit basket containing a variety of common and exotic fruits	100% Cotton, short sleeve, crew neck	Boot cut, 3-button fly	Belgium chocolate

The following is an example when you select *Single page without categories*. Notice that the product categories are not listed, and all products are listed in one long list with details.

Product Listing			
(No Image Available)	<a href="#">Pants</a> Boot cut, 3-button fly	Quantity 1 - 19 20+	Original Price \$25.00 \$20.00
<input type="button" value="Add to Cart"/>			
	<a href="#">T-shirt</a> 100% Cotton, short sleeve, crew neck	Original Price: \$10.00	Click product to select attributes
(No Image Available)	<a href="#">Chocolate</a> Belgium chocolate	Original Price: Enjoy your soup	<input type="button" value="Add to Cart"/>

b.

If you selected Standard category listing, perform the following steps:

i.

For *Section 1 label*, enter the label that will be displayed above the list of products. In the figure for *Standard category listing* above, notice that the label reads *Kintera's Featured Products*.

ii.

Click **Select Products**.

iii.

In the resulting window, select the check box for all products you want to appear in the event page and then click **Save**.

iv.

Click **Sort Products**.

v.

In the resulting window, organize the products the way you want by selecting a product and

then clicking the directional arrows to move the product where you want. This is the order the products will be listed in the event page. Click **Save** when done.

vi.

Click **Display products above category list** or **Display products below category list** to specify whether the products will be displayed above or below the product category.

The following is an example showing *Display products above category list*. Notice that the products T-shirt and Pants are listed above the category named *Clothing*.

Please click on the product name for details.

Click on the "Add to Cart" button to add a product to your shopping cart.

Kintera's Featured Products	
<a href="#">T-shirt</a>	<a href="#">Pants</a>
100% Cotton, short sleeve, crew neck	Boot cut, 3-button fly

Please select a product category below to continue:

Store Directory	
Category Name	
	<a href="#">Clothing</a>
© Copyright 2008 Kintera, Inc. All rights reserved.	

The following is an example showing *Display products below category list*. Notice that the products T-shirt and Pants are listed below the category named Clothing.

Please click on the product name for details.

Click on the "Add to Cart" button to add a product to your shopping cart.

Please select a product category below to continue:

Store Directory	
Category Name	
	<a href="#">Clothing</a>
© Copyright 2008 Kintera, Inc. All rights reserved.	

Kintera's Featured Products	
<a href="#">T-shirt</a>	<a href="#">Pants</a>
100% Cotton, short sleeve, crew neck	Boot cut, 3-button fly

vii.

Select the **Display Thumbnail image** check box if you want to show a small picture of the product next to its name.

viii.

Select the **Display product Description** check box if you want to show the product's description below the product's name, as shown in the above figure.

c.

If you selected *Single page without categories*, perform the following steps:

i.

For *How many Products do you want to display per page*, select the number of products

that will be listed on one page.

ii.

Select the check box for **Allow visitors the choice to view more products per Page** if there are more products than can be displayed per page and you want visitors to be able to go to a specific page. In the figure below, notice that visitors can go to page 1, 2, Next, or Last.



- For *How many products would you like to display in one row*, select the number of products. Notice in the above figure that only one product is in a row (Pants is in one row, and T-shirt is in another row). The more products you include in a row, the less amount of information will be displayed for the product.
- Select the *Display Price below product name* check box to show the price when you show more than one product per row. The price of the product is included below the product's name, as shown in the figure below.



- Select the **Display "Add to cart" button** check box to add the *Add to cart* button so that visitors can select and purchase products. You can replace the generic button with your own picture by performing the

following steps:

- a. Select the **Replace “Add to cart” button** with this image check box.
- b. Click **Select Image** to select and add the image.
- c. Specify where the image will appear by selecting the **Above** or **Below** option.
6. Select the **Replace “View Cart” button** with this image check box if you want to replace the generic graphic with your own picture, and then select the image that will be used.
7. Select the **Replace “Product Categories” button** with this image check box if you want to replace the generic graphic with your own picture, and then select the image that will be used.
8. Select the **Remove “Product Categories” link from the nav bar** check box if you do not want to show the *Product Categories* link in the event page.
9. Select the **“Remove search function from the nav bar** check box if you do not want visitors to be able to search for products or product categories.
10. Click **Save**.
11. Click **Webinfo Checklist** in the Breadcrumb.
12. Verify that **eCommerce Catalog** contains a check mark.
13. Configure eCommerce sales tax as described below.

#### Step 4: Configure eCommerce sales tax

1. In the *Event Website Creation Checklist*, click **eCommerce Sales Tax Configuration** under *Add Ons*. The *eCommerce Sales Tax Configuration* page opens.
2. Select the **Enable Sales Tax in eCommerce** check box.
3. Click **New**.
4. In the resulting window, perform the following steps:
  - a. For *Select State*, select a state.
  - b. For *Sales Tax Rate*, enter the tax rate for the selected state. If you do not know the sales tax rate for a specific state, go to [www.taxadmin.org/FTA/rate/sales.html](http://www.taxadmin.org/FTA/rate/sales.html) for the latest State Sales Tax Rates.

**Note:** When site visitors make a purchase, the applicable tax amount will be added to the purchase price.

- c. Click **Save**.
- d. Verify that the information has been added to the *eCommerce Sales Tax Configuration* page.
- e. Click **Save**.
5. Verify that **eCommerce Sales Tax Configuration** in the *Event Website Creation Checklist* page contains a check mark.
6. Configure eCommerce shipping options as described below.

#### Step 5: Configure eCommerce shipping options

1. In the *Event Website Creation Checklist*, click **eCommerce Shipping** under *Add Ons*. The eCommerce

Shipping and Handling Information page opens. You will use this page to set up shipping options for all products in the shopping cart. The Shipping Options tab is in focus.

2. For *Base Shipping Fees*, select one of the following options:
  - a. Select **Base Charge + Weight** if you want the shipping fee to be based on a specific dollar amount plus the weight of the package being shipped, and then click **New**. In the resulting page, perform the following steps:
    - i. For *Shipping Method/Name*, enter a name for the shipping charge (for example, Standard Base Plus Weight Shipping).
    - ii. For *Description*, enter a brief description that will clarify the purpose of this fee if you (or another individual) have questions later.
    - iii. For *Base Charge*, enter the base charge. This information is important and must be accurate. You should have worked with your local Post Office to acquire the accurate base charge.
    - iv. For *Price Per Pound/Unit*, enter the cost per pound or per unit. Again, this information is important and must be accurate.
    - v. Click **Save**.
  - b. Select **Scaled Shipping Charges** if you want to apply a shipping discount for multiple items. For example, you could charge a lesser shipping fee for purchases of 10 or more products. Select one of the following options:
    - i. Select the **firstScale option** if you want the shipping discount to be applied towards the total number of items in the shopping cart, and then perform the following steps:

In the first row, enter the shipping charge in the *Shipping Charge* field. This information is important and must be accurate.

You can click **New** to add additional rows if you want to apply discounts for multiple items in the shopping cart. You will need to enter the criteria in *Number of Basket Items in Between*. For example, if number of items is from 1 to 10, the shipping charge is \$10 dollars. For 11 or more items, the shipping charge is \$8.
    - ii. Select the **secondScale option** if you want the shipping discount to be applied towards the total dollar amount of all items in the cart (for example, if the total amount is \$100 then apply X shipping discount), and then perform the following:

In the first row, enter the shipping charge in the *Shipping Charge* field. This information is important and must be accurate.

You can click **New** to add additional rows if you want to apply shipping options based on the total dollar amount of all items in the shopping cart. You will need to enter the criteria in *Basket Sub-total is Between*. For example, if total dollar amount for all items in the shopping cart is from \$1 to \$100, the shipping charge is \$10. For all items over \$100.01, the shipping charge is \$8.
  - c. Select **Apply flat fee by product** if you want the shipping fee to be based on a flat fee that you specified at the product level. The largest shipping fee will be used. For example, if at the product level you specified a \$5 and \$10 shipping fee for products, \$10 will be used as the shipping fee for all products added to the shopping cart.

**Note:** Product level shipping fees override cart level fees.

- d. Select **Apply fee by percentage** if you want the fee to be based on a percentage of the total cost of

all items in the shopping cart. For example, if you have 10 items that total \$100 in the shopping cart and you enter 10%, the shipping fee will be \$10. You must also specify a minimum shipping fee amount and the system will use the larger of the two numbers (either percentage or minimum amount). You can also specify a maximum shipping fee. You would not want to charge a purchaser \$30 to ship a \$5 T-shirt.

- e. Click **Save**.
3. Select the **Additional Shipping Fees** tab if you want to apply additional charges for shipping the product, and complete the page as follows:
  - a. Click **New**.
  - b. For *Name*, enter a name (for example, UPS, Federal Express, Overnight, or name of other country where the product is being shipped).
  - c. For *Description*, enter a brief description.
  - d. For *Minimum Amount*, enter the minimum amount (in USD) that will be added to the shipping fee.
  - e. For *Maximum Amount*, enter a maximum amount that will be charged to ship the product.
  - f. For *Percentage*, specify a percentage of the total shipping fee that will be added to ship the product. For example, if the total shipping fee was \$10 and you add an additional 10 percent, the total shipping fee including additional fees will be \$11.

**Note:** When you specify a *Minimum Amount* and a *Percentage*, the larger of the two amounts will be applied towards shipping.

- g. For *Country* for domestic shipping, select where the package is being shipped.
- h. If you selected *United States*, click **Domestic**. If you selected another country, click **International**.
- i. Click **Add**.
- j. Verify that the new shipping fees are added to the list for *Additional Shipping Fees*.
4. Select the **Order Level Discounts** tab if you want to apply shipping discounts at the shopping cart level.

**Note:** For the discount to be applied towards shipping, the purchasers will need to supply the discount code or benefit, and the code or benefit must already exist in the database.

- a. Click **New**. The *Add Order Level Discount* page opens.
- b. For *Name*, enter a name for the discount (for example, Shipping Discount for Senior Citizens).
- c. For *Description*, enter a brief description.
- d. For *Discount Based on*, click **Discount** and then select the discount code that will be associated with this shipping option; or click **Benefit** and then select the benefit.
- e. For *Discount Value*, click **Amount** and then enter the dollar amount of the discount, or click **Percentage**, and then enter the percentage.
- f. For *Apply discount to*, select one of the following options:
 

Click **Products** if you want the shipping discount to only be applied toward the total of all products in the shopping cart.

Click **Shipping** if you want the discount to only be applied toward the shipping cost of all products in the shopping cart.

Click **Products & Shipping** if you want the discount to be applied towards all products in the shopping cart, including shipping costs.

- g. Click **Add**.
  - h. Verify that the new discount is added to the list for *Order Level Discounts*.
5. Select the **Product Level Discounts** tab if you want to apply shipping discounts to individual products, and not all products in the shopping cart. Discounts you apply here will override discounts you apply on the Shipping Options tab.
- a. Click **New**. The *Add Product Level Discount* page opens.
  - b. For *Name*, enter a name for the product level discount.
  - c. For *Description*, enter a brief description.
  - d. For *Discount Based on*, click **Discount** and then select the discount code that will be associated with this shipping option; or click **Benefit** and then select the benefit.
  - e. For *Discount Value*, click **Amount** and then enter the dollar amount of the discount, or click **Percentage**, and then enter the percentage.
  - f. Click **Add**.
  - g. Verify that the new discounts are added to the list for *Product Level Discounts*.
  - h. If you want to prevent the discount code from appearing on the event site, select the **Remove product...** check box and then click **Save**.

#### Step 6: Update the event site and preview it in a browser window

1. Click **Webinfo Checklist** in the Breadcrumb.
2. In the *Event Website Creation Checklist*, click **Publish This Event Now**.
3. Confirm that you want to publish changes to the website.
4. Verify that **Preview** is selected for *Actions*.
5. For *Web Address*, click **Go**.
6. Confirm that you want to preview the event site. The Web site opens in a browser window.
7. Click the **Ecommerce Catalog** link you created in *Step 1: Enable eCommerce in an event site*.
8. Preview the page to make sure it contains the information you completed. Complete a purchase as if you were a buyer to verify that taxes, discounts, and shipping options are applied accurately. To test the purchase, you can use our test credit card Visa with account number 4111111111111111 (4 plus 15 ones).



The following figure is an example of what a purchaser will see after making a purchase on the event site:

Shopping Cart				
Name	Description	Quantity	Price	Total
T-shirt	100% Cotton, short sleeve, crew neck Color:Pink	1	\$12.00	\$12.00
			Sales Tax (7.50%):	\$0.90
			Product Discount:	-\$1.20
			Subtotal:	\$11.70
			Shipping Cost:	\$22.00
			Total + Shipping:	\$33.70

### ► Customize forms in an event site

Use this procedure to customize forms in a Thon event site. All the forms you need when you create a Thon event site are ready for you to use. You can customize the forms if you want to change a field's default settings or to create custom fields.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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#### Step 1: Select the form you want to customize

- In the *Event Website Creation Checklist*, click **Customize Forms** under *Add Ons*. The *Customize Forms* page opens, and the *Select Forms* tab is in focus.
- Click **Select** for the form you want to customize.

The fields for the selected form appear. Notice the following four buttons: *Standard Profile Fields*, *Custom Profile Fields*, *Standard Event Fields*, and *Custom Event Fields*. These represent field groups or categories on the form. When you click a field group, the form fields in that group will be displayed. For example, if you click *Standard Profile Fields*, the standard profile form fields (such as name, address, and phone number) will be displayed. If you click *All*, you will see the form fields for all field groups on one page.

- Customize fields in the form as described below.

#### Step 2: Customize form fields

- Click **All** if you want to display all fields on one page one, or click one of the field groups (**Standard Profile Fields**, **Custom Profile Fields**, **Standard Event Fields**, or **Custom Event Fields**) to only display the fields for that group.
- Customize the fields as follows:

- Click **Inactive** if you do not want a field to appear on the form.
- Click **Active** if you want a field to appear on the form.
- Click **Required** if you want to make an active field mandatory. An asterisk (\*) will appear next to the field's name to indicate it is required. Visitors who are completing the form must complete all required fields.

**Note:** Some form fields (for example, *Last Name*) are system required fields, and you cannot change their settings.

- The **Read-only** column is grayed out for Thon events.
- Click **Read-only on Profile Form** to make an active field read-only on a profile form. Site visitors will see this change on the profile form after they access the form using *Edit my Profile* in *My HQ*. All fields marked with *Read-only on Profile Form* cannot be changed. This option is only available for *Start a Team*, *Join a Team*, and *Join as Individual* forms.

**Note:** This option does not appear when you configure the *Mobile Registration Form* because it uses the **Read-only on Profile Form** selections from the *Start a Team*, *Join a Team*, and *Join as Individual* forms.

- **Data Type** shows the type of information the field will accept. For example, a visitor can enter text in a text box, select an item from a menu, select a check box, or click an option using a radio button.
  - Click **Set Default** to establish a default for a field. In the resulting window, enter the default information you want to appear in the form field. For example, if you want the default for the field *Title* in *Standard Profile Fields* to always be *Mr.*, then you would select *Mr.* in the resulting window. When registrants access their profile form using *Edit my Profile* in *My HQ*, the *Title* field will default to *Mr.*
3. After you complete the fields, click **Save & Preview** to see what the form will look like.
  4. Make any adjustments and then click **Save & Done**. The Customize Forms page appears.
  5. Customize form Add-On fields as described below.

### Step 3: Customize form Add-On fields

1. In the *Customize Forms* page, click **Add-Ons**.  
In the *Add-Ons* page, you will enable fields that automatically place registrants in segments or allow them to select the segments to which they want to belong when they register for an event. You can select one or the other, but not both. You will also provide registrants the opportunity to sign up for eNewsletters.
2. To allow registrants to select the segments to which they want to belong, complete *Segmentation Selection* as follows:
  - a. Click **Hierarchical Tree Structure (3 segmentation level limit)** to show the *Your Interest Area* section on the form. The segments will be indented under the segment categories. Or click **Column Structure (unlimited segmentation levels)** to show the *Your Interest Area* section on the form. The segments will not be indented under the segment categories.
  - b. Expand the segment category you want to add to the form, and then select the check box for the segment to add it to the *Display Order for Segment Categories* text box.
  - c. If you want to change the order the segment categories appear on the form, select a category in the *Display Order for Segment Categories* text box and then click **Top**, **Move Up**, **Move Down**, or **Bottom** to change its order.
3. To automatically place registrants in segments, complete Auto-Segmentation as follows:

- a. Expand the segment category you want to add to the form.
  - b. Select the check box for the segment to add it to the **Display Order for Segment Categories** text box.
  4. For *eNewsletter Sign-Up*, make your selection as follows:
    - Click **Inactive** for an eNewsletter if you do not want the eNewsletter to be added to the form.
    - Click **Active Default 'Yes'** if you want to add an eNewsletter to the form. The Subscribe to our eNewsletter section will be added to the form, and the eNewsletter will be selected by default. Registrants can deselect a check box if they do not wish to subscribe to an eNewsletter.
    - Click **Active Default 'No'** if you want to add an eNewsletter to the form. The Subscribe to our eNewsletter section will be added to the form, but the eNewsletter will be not selected. Registrants can select the eNewsletters to which they want to subscribe.
  5. Click **Save & Preview** to see what the fields will look like on the form.
- Note:** If you selected Auto-Segmentation, the Your Interest Area section will not be added to the form.
6. Make any adjustments and then click **Save & Done**. The *Customize Forms* page appears.
  7. Customize the order by which fields appear on the form, and the text displayed for the fields as described below.

#### Step 4: Customize the order fields appear on the form and the text displayed

1. In the *Customize Forms* page, click **Field Order and Label Text**.
2. For *Form Description*, enter any information you want to add to the beginning of the form (for example, what the form is for).
3. For *Form Title*, enter the title you want to be displayed at the top of the form.
4. For *Supporter Fields*, use the default text or enter the label you want to appear above the personal information fields on the form.
5. For *Section Options*, make your selection as follows:
  1. Select the **Insert Line Separator** check box if you want to separate each area on the form with a horizontal line, and then specify the line's length by percentage (25% is a short line that is centered on the form, and 100% extends the line across the length of the form).
  2. Select the **Insert Line Breaks** check box if you want to add spaces after the horizontal line, and then select the number of spaces. This is mostly for aesthetics.
6. For *Section Note*, enter a note that will appear below the section label. For example for *Personal Information*, the note will appear below the *Personal Information* label.
7. Organize the personal information fields in the text box using **Top**, **Move Up**, **Move Down**, or **Bottom** to change their order.
8. Perform steps 4 to 7 for all other sections in the form, as applicable. The title for step 4 will be labeled accordingly in the other sections.
9. Click **Save & Preview** to see what the form will look like.
10. Make any adjustments and then click **Save & Done**. The *Customize Forms* page appears.
11. Set up E-mail confirmations as described below.

#### Step 5: Set up E-mail confirmations

1. In the *Customize Forms* page, click **Confirmation**.
2. Select the **Do not send eMail confirmation for this form** check box if you do not want to send a Thank you for registering E-mail to registrants.  
**Important:** Confirmation E-mails contain important user login information the registrant will need to log into their headquarters, so carefully consider selecting this check box.
3. Click **Save**.
4. [Update the event site](#) and preview the form in a browser window as described below.

#### Step 6: Update the event site and preview the form in a browser window

1. Click **Webinfo Checklist** in the Breadcrumb.
2. In the *Event Website Creation Checklist*, verify that **Customize Forms** contains a check mark.
3. Click **Publish This Event Now**.
4. Confirm that you want to publish changes to the website.
5. Verify that **Preview** is selected for *Actions*.
6. For *Web Address*, click **Go**.
7. Confirm that you want to preview the event site. The Web site opens in a browser window.
8. In the side bar, click a link that will contain the form you customized.

For example, if you customized the *Start a Team* form, click **Participant Registration** (or the name provided for the link), click **Start a Team** in the resulting page, complete required fields, and then click **Continue**.

9. Preview the form to make sure you are satisfied with it.

#### ► Activate matching gifts for a Thon form

Use this procedure to activate the **Company Name** and **Matching Gift Amount** fields so they appear in a **Matching Gift Information** section on Thon forms. Supporters will see the field when they complete a donation or registration forms. Users will see the field when they complete donation or registration forms on behalf of supporters from the event's *Bookkeeping* section.

#### Prerequisites

- A Thon event site is [created](#)

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator. The Thon events page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Add Ons*, click **Customize Forms**. The *Customize Forms* page opens.
3. Perform the following steps to activate the matching gift fields on the forms supporters will see:
  - a. Under *Website Forms*, click **Select** for one of the registration or donation forms.
  - b. In the resulting page, click **Standard Event Fields**.

- c. Under *Matching Gifts Information*, select one of the following options for the **Company Name** and **Matching Gift Amount** fields:

**Note:** Your selection applies to both matching gift fields.

- Click **Active** if you want to show the field on the form but not make it a required field.
  - Click **Required** if you want to show the field on the form and make it a required field.
- d. Click **Save & Preview** to view the field in a sample form.
4. Perform the following steps to activate the matching gift fields on the forms that Sphere users will see when they complete a donation form on a supporter's behalf:
- a. Under *Sphere Entry Forms*, click **Select** for one of the registration or donation forms.
  - b. In the resulting page, click **Standard Event Fields**.
  - c. Under *Matching Gifts Information*, select one of the following options for the **Company Name** and **Matching Gift Amount** fields:
    - Click **Active** if you want to show the field on the form but not make it a required field.
    - Click **Required** if you want to show the field on the form and make it a required field.
  - d. Click **Save & Preview** to view the field in a sample form.
  - e. Update the event.

#### ► Generate a matching gift donor report

Use this procedure to create a report that filters donations for pending and confirmed matching gifts.

##### Prerequisites

- A Thon event site is [created](#) and [launched](#)
- Matching gifts are [activated](#)
- Matching gifts are pending or [confirmed](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Reports** to open the *Reports* page.
2. In the **Run quick report** field, select **People: All Donors**.
3. Click **Run Report** to open the *Customize* page for *People: All Donors*.
4. Under **Select Transaction Date Range**, select the date range for the report.
5. Under **Customize Report**, filter the report to include matching gifts by entering the information below for **Group**:
  - a. In the left selection box, select **Donor Reference**.

**Note:** Sphere uses the **Donor Reference** field on records for matching gift organizations to link them to donors.

- b. In the middle selection box, select **Greater Than**.
  - c. In the third text box, enter two double quote signs "" to indicate a blank value.
6. Click **Next**.
7. On the resulting page, select the **Donor Reference** check box and any other fields you want to include in the report.
8. Under **Show columns...**, arrange the columns in the order you would like to display them in the report.
9. Under **Sorting Preference**, specify the report sort order.
10. Click **Finish**.
11. In the *Report Preparation* page, specify when to generate the report (immediately or in the background so that you can continue to use Sphere).

**To immediately generate the report**

- a. Click **No - Run the report immediately and wait for it to complete**.

When you select **No**, all fields listed under the **Yes** option are disabled.

**To generate the report in the background and receive notification when it is ready**

- a. Click **Yes**, or verify that it is selected.
  - b. In the **Report Name** field, enter a name.
  - c. In the **eMail Notification** field, the text box contains the Email address of the person logged into the account. If necessary, enter a different E-mail address.
  - d. In the **eMail Message** field, enter any message you want to communicate to recipients when they receive the E-mail notification.
  - e. In the **Report Format** field, select one of the following options:
    - Select Excel for report results in Microsoft Excel format. Sphere saves the file with the .xls extension.
    - Select CSV for report results in comma separated value format. Sphere saves the file with the .csv extension.
12. Click **Run Report**.

If you selected **No** in step 11, the report page opens and includes all the event's matching gifts.

If you click **Yes**, a message appears to inform you that the report was submitted and will process in the background. The time it takes to process depends on network traffic and the amount of information the report will contain. After processing, the system sends a notification to the E-mail address specified in the **eMail Notification** field, and includes a link to access the report. Save the report to your computer, or download and view it immediately.

► **Customize participant HQ settings in a Thon event site**

Use this procedure to show or hide the *Volunteer Projects* tab in *My HQ*, define event terms, and show or hide the *Gadgets* tab in *My HQ*.

**Prerequisites**

The Thon event site is [created](#)

<b>Starting</b>	You are logged into Sphere.
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<b>point:</b>	The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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### Step 1: Customize participant HQ settings

1. Highlight the event's name and then select **Website Info**.
2. In the *Event Website Creation Checklist* page, click **Participant HQ Settings** under *Add Ons*. The *Participant HQ Settings* page opens.
3. Show or hide the *Volunteer Projects* tab in *My HQ* as follows:
  - a. Select the **Volunteer Project** check box to show the **Volunteer Project** tab in *My HQ*.
  - b. For *Redefine Tab Name*, accept the default name or enter a new name for the *Volunteer Project* tab.
4. Define event terms as follows:
  - a. For *Project Manager*, accept the default label or enter a label.
  - b. For *Volunteer Project*, accept the default label or enter the label that will appear in the *Volunteer Project* tab when you select the tab.
  - c. For *Volunteer Position*, accept the default label or enter the label for the volunteer position column in the *Volunteer Projects* tab.
5. Show or hide the *Gadgets* tab in *My HQ* as follows:
  - a. Select the Gadgets check box if you want to show the Gadgets tab in *My HQ*.
  - b. For *Redefine Tab Name*, accept the default name or enter a new name for the *Gadgets* tab.
  - c. For *Honor Roll*, accept the default name or enter a new name for the *Honor Roll* gadget. You will see this name change when you view the Web site where the gadget is placed.
  - d. For *Thermometer*, accept the default name or enter a new name for the *Thermometer* gadget. You will see this name change when you view the Web site where the gadget is placed.
6. Click **Save**.
7. [Update and preview](#) the event site in a browser window as described below.

### Step 2: Update the event site and preview it in a browser window

1. In the *Event Website Creation Checklist*, verify that **Participant HQ Settings** contains a check mark.
2. Click **Publish This Event Now**.
3. Confirm that you want to publish changes to the website.
4. Verify that **Preview** is selected for *Actions*.
5. For *Web Address*, click **Go**.
6. Confirm that you want to preview the event site. The Web site opens in a browser window.
7. Log into *My HQ*.
8. Verify the tabs exist.

### ► Copy an existing Thon event site

Use this procedure to copy an existing Thon event site to create a new site. The new site will inherit all of the settings of the site being copied. You can make specific changes later, after you copy the site.

**Note:** You cannot duplicate (copy) a Thon event that is associated with an Event Group (or uses the company pyramid structure) because the Event Group will not be pulled into the duplicated event.

#### Prerequisites

- The Thon event site you want to copy already exists

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Select the check box next to the name of the Thon event site you want to copy, and then click **Duplicate**.
2. Click **OK** for *Are you sure you want to copy the selected initiative(s)?*.
3. Verify that a new copy is added to the event list.  
The new copy will inherit the name of the Thon event site you copied, plus the word *Copy* (for example, Walk for Peace Copy).
4. If you want to change the new event site's name, perform the following steps:
  - a. Highlight the event's name and then select **Website Info**. The *Event Website Creation Checklist* page appears.
  - b. Click **Event Information** and edit the *Event Name*.
  - c. Click **Save**.
  - d. Click **Webinfo Checklist** in the Breadcrumb.
  - e. Click **Publish This Event Now**, and confirm that you want publish changes to the website.
  - f. Click **Kintera Thon** in the Breadcrumb.
  - g. Verify the name change.

### ► Delete a Thon event site

Use this procedure to delete a Thon event site. When you delete an event site, you cannot recover it. All information pertaining to the site will be lost.

#### Prerequisites

- The Thon event site you want to delete already exists

<b>Starting point:</b>	The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Select the check box for the Thon event site you want to delete, and then click **Delete**.
2. Confirm that you want to delete the event site.
3. Verify that the site is removed from the event list



**Note:** If you do not need to delete an event site, you may want to consider disabling it. It will not be available for the public to access. If you delete an event you will no longer be able to manage the data in the event or run reports specific to that event.

## Friendly URLs and Event Sites Overview

A URL (Uniform Resource Locator) is the Web address of a resource (HTML pages, databases, even queries) on the Internet. An example of a URL is `http://www.blackbaud.com`. Web browsers request Web pages from a resource that is connected to the Internet using a URL.

A URL has two main components: a *protocol identifier* and a *resource name* (see figure below).



The http part of the URL is the *protocol identifier* and specifies the protocol that will be used to acquire the resource (for example, HTTP, FTP, Gopher, File, News, and so on). The `//www.blackbaud.com` part of the URL is the resource name and specifies the resource's address.

Some URLs (such as, `www.blackbaud.com`) are short and easy to remember and type in a browser window. Others are long and are more difficult to remember or type. Imagine asking a site visitor to type the following URL in their browser window to access your event site:



By creating a *friendly URL* for an event site, you can communicate an easier to remember Web address to site visitors or event supporters by including the URL in your print, E-mail, eNewsletter, or other communications such as Facebook and Twitter. Additionally, friendly URLs enable site visitors and event supporters to easily identify the site as being from a reliable source.

Create a friendly URL that:

- only shows your organization's domain name (for example, *myorganization.com*)
- shows your organization's domain name and ours (for example, *myorganization.kintera.org*)

The type of friendly URL you create depends on the information you want site visitors to see in their browser's address bar when they visit your event site. See [Creating a Friendly URL for an Event Site](#) for important information.

## Creating a Friendly URL for an Event Site

Create a friendly URL to enable site visitors and event supporters to enter an *easy to remember and type* event site Web address in their browser window, or to see a recognizable organization name in communications you send (for example, event links in E-mails, eNewsletters, or other communications such as Twitter tweet or Facebook status update). You can create a friendly URL for Sphere *Special Events* such as Thon, Gala, Quick Event, and so on.

The first time you create a friendly URL, the *Friendly web address* field displays *none* to indicate that a friendly URL has not been created for the event site (see figure below). The *Edit* button opens a page within which you can create the friendly URL.



After you create a friendly URL, the *Friendly web address* field displays the friendly URL you created. Additionally, Sphere displays the *Edit*, *Go*, and *Release* buttons to enable you to modify the friendly URL, preview the site, or stop using the friendly URL (see figure and table below).



Use...	To...
Go	Open the event site in a browser window so that you can preview it before activation and experience the site as your visitors will.
Edit	Make changes to the existing friendly URL, including selecting a different domain root or adding identifiers to a domain root if this was not done when the friendly URL was created.
Release	Assign the friendly URL to another event site. For example, an event has already taken place and you want to use the same friendly URL for another event).

### Showing your Organization's Domain Name and Ours in a Friendly URL

Use the domain root to create a friendly URL for an existing event site that shows your organization's domain name as well as ours. When site visitors access and view the event site in a browser window, they will see a friendly URL that contains your organization's domain root, Blackbaud (Kintera) domain name, and the path to the event site including the event's ID (see figure below).



You do not need to provide us any additional information when you create a friendly URL that shows your organization's domain name and ours. Simply create the friendly URL, and the system will associate it with a system generated URL automatically assigned to the event site. If you do not create a friendly URL, the system-generated URL will be displayed in the browser's address bar. See [System-Generated Web Addresses and Friendly URLs](#) for additional information.

### Showing Only your Organization's Domain Name in the Friendly URL

To create a friendly URL for an event site that only shows your organization's domain name, the following must already exist:

- The domain name your organization plans to use for the friendly URL must be registered with a domain name registry.
- You must provide us the domain name so that we can create a CNAME (canonical name) record for the domain name. See *Sending a Request to Create a CNAME for a Domain Name* below for important instructions. The CNAME is an alias that includes *kintera.org*. For example, if the domain name is *www.myorganization.org*, we will create the alias *myorganization.kintera.org* in the Sphere database. The *www.myorganization* part of the alias is referred to as the *domain root*.
- We will also create an A record (commonly referred to as the @) that maps the CNAME to an IP address.

The figure below illustrates the process:



**Note:** Registering a domain name or creating CNAMEs and A records requires in-depth understanding of DNS (Domain Name Service). If you do not have this knowledge or experience, contact the appropriate system administrator at your organization for assistance.

### Sending a Request to Create a CNAME for a Domain Name

To send us your organization's domain name, go to <http://www.blackbaud.com/casecentral/createacase.aspx> and submit a support request that includes the information in the sample request below:

Please create a CNAME for [enter your organization's name] and route [enter the domain name] to the following Sphere event site: [enter the system-generated URL for the event site].

After we create the CNAME and A records for your organization's domain name, we will send you instructions for modifying your *DNS Zone file*, a necessary step before you activate the event site.

### Updating your DNS Zone File

Include the following two entries in your DNS Zone file to point to the event site, or send these instructions to your DNS host:

1. *A record* entry for the domain root (for example, *myorganization.org*), which must point to the IP address we specify in the instructions; this is because it is typically not possible to create a CNAME for a domain root.

**Note:** If you are using a *subdomain* (for example *subdomain.myorganization.org*) you do not have to change the A record.

2. *CNAME* entry for the domain name, which should point to the CNAME we specify in the instructions.

It takes approximately 0-72 hours for a CNAME to propagate. Once propagation completes, you can activate the event site.

### If your Organization Owns and Registers Several Domain Names

If your organization owns and registers several domain names and we create CNAMEs and A records (aliases) for them, when you attempt to create a friendly URL for an event site you can choose from a list of domain roots created for your organization (see figure below). In order for the list to display, we will modify your organization's account accordingly.



### Using Event Identifiers in Friendly URLs

You can include additional event identifiers to a domain root. For the *Friendly URL* field in the above figure, notice the word *SpringEvent2009* in the text box after the backslash (/). It is being used to further identify the event site and is sometimes called the *domain folder*. The event identifier appears on personal and team pages when friendly URL is enabled for the event site. For example, assuming your organization hosts four annual events (Spring, Summer, Fall, and End of Year), you can add these identifiers to the domain root of each event's friendly URL (for example, *www.jimmyfund.kintera.org/SpringEvent2009*, *www.jimmyfund.kintera.org/SummerEvent2009*, and so on). You are not required to enter identifiers in the text box. Any text you enter in the text box will be displayed in the event site's Web address (see figure below).



**Note:** The event identifier also appears on personal and team pages when friendly URL is enabled for personal and team pages.

## Friendly URLs

A friendly URL is a Web address that is easy to read and includes words that describe the content of the webpage. This type of URL can be "friendly" in two ways.

1. It can help visitors remember the Web address
2. It can help describe the page to search engines

### ► Create or update a friendly URL for an event site

Use this procedure to create a friendly URL for a special event site (for example, Thon) so that you can distribute an *easy to remember and type* Web site address in your communications (such as print, E-mail, and eNewsletter) to site visitors or event supporters. You can create a friendly URL that only shows your organization's domain name in the browser's address bar (for example, *myorganization.com*), or create one that also includes our domain name (for example, *myorganization.kintera.org*). Deciding which type of friendly URL to create depends on what you want site visitors to see in the browser's address bar when they visit your Web site. If you plan to only show your organization's domain name, you will need to set up a canonical name (CNAME) and A Record. See [Creating a Friendly URL for an Event Site](#) for details.

After you create the friendly URL, enable it so that participants and their personal page visitors will see the friendly URL in their browser window.

### Prerequisites

- You have administrator access to the account or Virtual Account
- The event site is already created
- You have determined whether the friendly URL will only show your organization's domain, or will also include kintera.org
- If you will only show your organization's domain name in the browser's address bar, the domain name you plan to use for the friendly URL is already registered with a domain name registry, and we have already created a CNAME and A record for your organization's domain name.

#### Starting point:

You are logged into the account or Virtual Account.

The *Kintera Thon* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. For *Friendly web address*, click **Edit**. The *Edit Friendly URL* page opens.
3. For Friendly URL, perform the appropriate steps below:

#### To create a friendly URL that shows your organization's domain name and ours

- a. In the first text box following *http://*, enter the domain root of the friendly URL (for example, *www.myorganization*).

**Note:** Do not include the domain name extension (for example, .com, .org, .net) in the text box. Doing so will cause the event site to not display in the browser window because there can only be one domain name extension in a Web address.

- b. Select a domain root if your organization has more than one domain name registered with a domain name registry and we have created domain roots for them in the Sphere database.
- c. (Optional) In the second text box, enter any additional event identifiers (for example, FallEvent2009).

Event identifiers help you to visually organize your events. For example, your organization may host four events each year (Spring, Summer, Fall, and End of Year). By adding event identifiers, you (and site visitors) can easily determine which event you want them to support.

- d. Click **Submit**. The page refreshes, and a message notifies you that the friendly URL was created.
- e. Click **Webinfo Checklist** in the Breadcrumb.
- f. Verify that *Friendly web address* contains the new friendly URL.
- g. Test the friendly URL to experience the event site as visitors will see it in the browser window.

#### To create a friendly URL that only shows your organization's domain name

**Note:** Do not include the domain name extension (for example, .com, .org, .net) in the text box. Doing so will cause the event site to not display in the browser window because there can only be one domain name extension in a Web address.

- a. Enter the domain root (for example, www.myorganization). This is the information we provided your organization when we created a CNAME and A record for your organization's domain name.

- Or -

Select a domain root if your organization has more than one domain name registered with a domain name registry and we have created domain roots for them in the Sphere database.

- b. (Optional) In the second text box, enter any additional event identifiers (for example, FallEvent2009).

Event identifiers help you to visually organize your events. For example, your organization may host four events each year (Spring, Summer, Fall, and End of Year). By adding event identifiers, you (and site visitors) can easily determine which event you want them to support.

### ► Test a friendly URL for an event site

Use this procedure to verify that a friendly URL created for an event site displays properly in the browser window's address bar.

#### Prerequisites

- The event site is already created
- You have access to the account or Virtual Account

<b>Starting point:</b>	<p>The browser window is open if you plan to test the friendly URL outside of Sphere.</p> <p>The <i>Kintera Thon</i> page is displayed if you plan to test the friendly URL from Sphere. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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#### Test a friendly URL via the Webinfo Checklist

1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. For *Friendly web address*, click **Go**.
3. If necessary, confirm that you want to preview the event site. The event site opens in the browser window.
4. Verify that the friendly URL is displayed in the browser window's address bar.

#### Test a friendly URL from a browser window

1. Click the link you received for the event.
2. Verify that the event pages display properly by checking all event pages and the friendly (or persistent) URL in the browser's address bar.

### ► Release a friendly URL

Use this procedure to make available for reuse a friendly URL that you are no longer plan to use for an event site. For example, the event may have already taken place and you want to use friendly URL for another event.

#### Prerequisites

- The friendly URL is already assigned to an event site
- You have administrator access to the account or Virtual Account

<b>Starting point:</b>	<p>You are logged into the account or Virtual Account.</p> <p>The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. For *Friendly web address*, click **Release**.
3. In the pop up window, confirm that you want to release the friendly URL. The page refreshes..
4. Verify that *Friendly web address* displays *none*.

## System-Generated Web Addresses and Friendly URLs

When you create an event site, the system automatically assigns it a Web address and event ID (see figure below).



By creating a friendly URL for the event site, you are mapping the domain root we created for your organization's domain name to the event site's system-generated URL. This causes the domain root to be included in the event site's Web address, which precedes the *kintera.org* domain name (see figure below).



Before you create a friendly URL for an event site, the site must be created in Sphere. Then, use the event site's *Webinfo Checklist* to create the friendly URL.

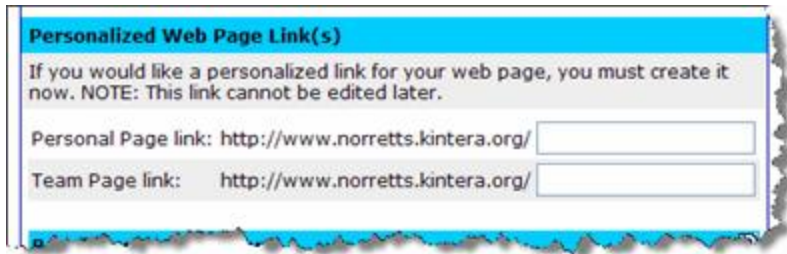
## Persistent Friendly URLs

A *persistent* URL is when the same URL is displayed in the browser's address bar regardless of the event page being displayed in the browser window. You will need to contact the Sphere Professional Services team for assistance by sending a request to Technical Support. You will also need to [update your DNS Zone File](#) to point to the event site.

## Enabling a Friendly URL in Personal and Team Pages

You can allow participants to add additional information to the end of a friendly URL when they register for an event or manage their personal web pages from their headquarters (for example, *myorganization.kintera.org/mypersonalpage*). Friendly URLs enable participants to create a link to their personal or team page that they can then send to friends and family. Before you can enable a friendly URL, you must first create it and then select the check box for *Participant Registration* and *Enable Friendly URLs* for personal and team pages on registration forms in *Website Features*. If you do not create the friendly URL, you will not be able to select the friendly URL check box.

When you enable friendly URL for personal and team pages and participants register for the event, they will see the friendly URL on the registration form (see example below). *Personal Page link* and *Team Page link* shows the friendly URL you created, and in the text boxes participants can add the information they want to include at the end of the friendly URL.



Participants can copy the *Personal* and *Team Page* links from their personal headquarters via their *My HQ* tab, and then paste the links in electronic communications. Or, they can simply type the information in other types of communications. Upon receiving the friendly URLs, participants' friends and family can use the links to access the participant's personal or team page. The actual path that will be displayed in their browser's address bar will be the friendly URL you created, and will not include the additional information participants added to the friendly URL during registration. The purpose of creating the *Personal* and *Team Page* links is to enable a participant to communicate an easy-to-use friendly URL to their personal and team pages.

If necessary, participants can add or edit friendly URLs from the *My Webpage* tab in their personal headquarters.

### ► Enable a friendly URL in personal and team pages

Use this procedure to enable an already-created friendly URL so that participants can include additional information to the end when they register for the event or manage their personal web pages from their headquarters. Friendly URLs allow registrants to create links to their personal or team pages that they can then send to their friends and family in print or other types of communications. The friendly URL participants send will contain the domain root, event identifier, and the information they provided when registering for the event (for example, *www.myorganization.kintera.org/fallevnt2009/myname*)

### Prerequisites

- You have already created the friendly URL for the event site
- You have administrator access to the account or Virtual Account

#### Starting point:

You are logged into the account or Virtual Account.



The *Kintera Thon* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Website Features**. The *Website Features* page opens.
3. For *Participant Registration*, perform the following steps:
  - a. Verify that the **Participation Registration** check box is selected.
  - b. Select the check box for **Enable Friendly URLs for personal and team pages on registration forms**.
4. Click **Save**. The page refreshes.
5. Click **Webinfo Checklist** in the Breadcrumb.
6. Verify that *Website Features* under *Event Customization* contains a check mark.
7. Click **Update Your Event Now**.
8. In the pop up window, confirm that you want to update the event.

## Web Site Monitoring and Analysis

Monitor and analyze your Web site traffic using the Google Analytics, Google Analytics Ecommerce Tracking, Google AdWords, and NetTracker features in Sphere.

### Google Analytics and Sphere Web Site Monitoring and Analysis

The Google Analytics feature in Sphere enables you to add a Google Analytics code snippet to your Thon or CMS site so that you can monitor how visitors find and use your site.

When you add a code snippet to a Thon site, you can also access URL information so you can configure destination goals and funnels in your Google Analytics account to monitor whether website users complete actions on your event website. A destination goal is a reporting tool in Google Analytics that allows you to specify the final page in a series of pages a user visits to complete a transaction such as a registration or donation. When you create a destination goal, you can also specify the steps in the path, known as a funnel, you expect users to take to reach the goal. For a registration, funnel steps include the registration selection, profile information, and billing pages.

To use Google Analytics to monitor site activities, you must create a Google Analytics property to receive a code snippet from Google Analytics that you can then add to your Web site. When Google Analytics collects your visitors' data, you can view their activities via Google Analytics reports. For information regarding how to create a Google Analytics property or report for a Web site, see Google Analytics Help. If you are not signed up with Google and Google Analytics, or want to learn more about these tools, visit [www.google.com](http://www.google.com).

**Note:** When you create a property in Google Analytics for a Sphere website, enter its friendly URL in the **Website URL** field.

When Google Analytics monitors your CMS or Thon Web site, it does not collect personal information that may have been entered in Sphere Web site forms, and does not make collected information available to third-party applications.

#### Using Google Analytics in Sphere

The Google Analytics code snippet you include in your Web site contains a Web Property ID that is unique for your organization's site URL. For each Web site you want to monitor and analyze with Google Analytics, copy and paste the code snippet in the Web site as described in [Add a Google Analytics code snippet to a Web site](#). Sphere will add the code snippet within the `<body>` tag of all site pages. If you are using Google Analytics to track ecommerce transactions for your Sphere Web site, see Google Analytics Ecommerce Tracking and Sphere Web Site Forms.

### Pasting the Google Analytics Code Snippet in a Web Site

In order to paste a Google Analytics code snippet in a Web site:

- For Thon or CMS sites, you must be able to access the event (initiative) or site.
- For Thon, paste the Google Analytics code snippet and configure destination goals via *Google Analytics*.
- For CMS sites, users must be able to access the Google Analytics Add-Ons tab, which is accessible when they are provided permissions to access the tab via Staff Privileges. If a user does not have permissions to access the Add-Ons tab, the user will be notified when attempting to do so. For more information, see [Enabling Users to Add a Google Analytics Code Snippet for a Site](#).

## Enabling Users to Add a Google Analytics Code Snippet to a Site

To add a Google Analytics code snippet to a Sphere Web site and enable site monitoring and analysis with Google Analytics, users must be able to access and manage the site.

If...	Access to the Google Analytics feature is...
The Thon site is already created or is new	Automatic  By default, users with <i>(System)</i> functional access who can access Sphere have full functional access to <i>Website Info</i> , from within which they can access <i>Google Analytics</i> and add or edit the Google Analytics code snippet and access destination goal and funnel page URLs. If a user is assigned a custom functional access and you want that functional access group to be able to access <i>Website Info</i> , you must assign <i>Full Access to Website Info</i> for the custom privilege group.
The CMS site is already created or is new	Automatic  By default, users who can manage the site can access the Google Analytics <i>Add-Ons</i> tab. This privilege is set in the

	<p>CMS site's <i>Add Ons</i> column from the <i>Staff Privileges</i> tab.</p> <p><b>Note:</b> If the CMS site existed before the addition of the Google Analytics feature, you may need to manually enable access to the Add-Ons tab (see the next figure) for all users to which you want to grant access privileges.</p>
--	--

### Preventing a user from accessing the Add-Ons tab

To prevent a user from accessing the Add-Ons tab, remove the *Add-Ons* check mark for the user.

When you remove the *Add-Ons* check mark for a user to prevent access to the *Add-Ons* tab, the user will be notified when attempting to access the tab. When you view the *Staff Privileges* page, although the *Add-Ons* check box will be selected, the user will not have permissions to access it. The system removes view privileges for *Website* and *Group*, and the user will not be able to select these links.

To allow access again:

- First, return to the *Content Management System* page and manage the Web site
- Then, display the *Privileges* tab (*Administer > Privileges*).
- Finally, reset *Allow privileges for Web Pages*, at a minimum.

## Enable users to access the Google Analytics feature for a Thon

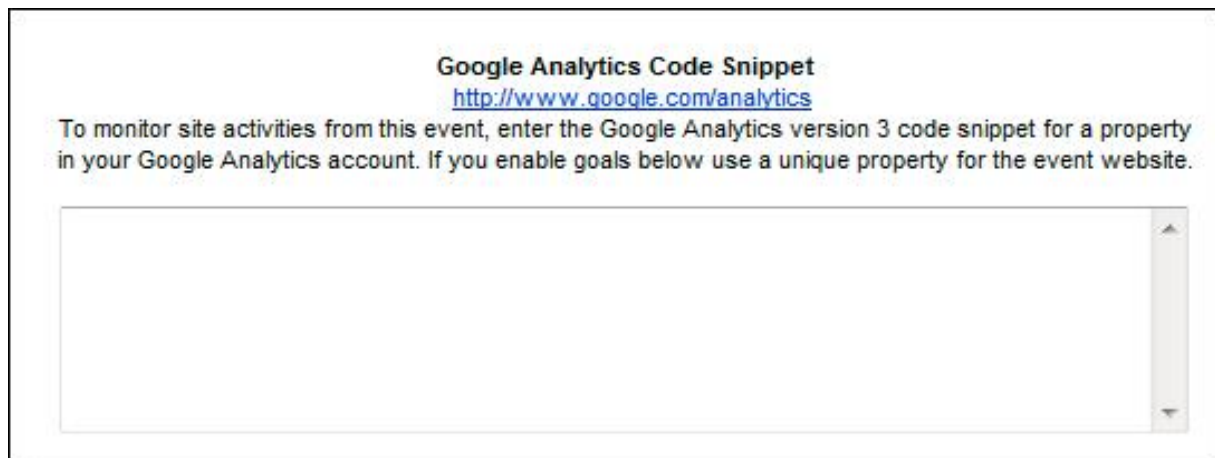
By default, users with (System) functional access who can access Sphere have full functional access to *Website Info*, from within which they can access *Google Analytics* and add or edit the Google Analytics code snippet. They can also access destination goal and funnel page URLs. If a user is assigned a custom functional access and you want that functional access group to be able to access Website Info, you must assign Full Access to Website Info for the custom privilege group.

## Adding a Google Analytics Code Snippet to a Sphere Web Site

See [Add a Google Analytics code snippet to a Web site](#) for specific instructions.

Before you add a Google Analytics tracking code snippet to an event site, create a property in your Google Analytics account for the event website and copy the snippet associated with it. When you manage the event site, paste the snippet into the snippet field in the *Google Analytics* section of the *Webinfo Checklist*. If you have not previously added a code snippet to a site, the text box is empty (see figure below). After you add the code, if you have changes simply make them here. The text box accepts up to 800 alphanumeric characters.

**Note:** When you create a property in Google Analytics for a Sphere website, enter its friendly URL in the **Website URL** field.



From the *Google Analytics* section, you can also access URL information to configure destination goals and funnels in your Google Analytics account and monitor whether website users complete actions on your event website. A destination goal is a reporting tool in Google Analytics that allows you to specify the final page in a series of pages a user visits to complete a transaction such as a registration or donation. When you create a destination goal, you can also specify the steps in the path, known as a funnel, you expect users to take to reach the goal. For a registration, funnel steps include the registration selection, profile information, and billing pages.

**Note:** If you plan to configure destination goals and funnels, the snippet you use must be associated with a property you add to your account specifically for the event website. For detailed information about accounts and properties, refer to the Google Analytics help documentation.

To configure destination goals and funnels, select a form under **Google Destination Goals** that corresponds to the goal you want to create. Copy the URLs for the steps, including the final destination goal, and paste them into the goals section for the event website property in your Google Analytics account.

URLs	
Step 1 (Waiver)	/waiver.asp
Step 2 (Default)	/default.asp
Step 3 (Pre Register)	/registerPre.asp
Step 4 (Register)	/register.asp
Step 5 (Billing)	/checkbilling.asp
Destination Goal URL	/checkPartLogin.asp

For CMS sites, add the code snippet to the CMS site's *Add-Ons* tab. The first time you access the *Add-Ons* tab for a site, the Google Analytics text box is empty (see figure below). To add a code snippet, edit the tab.

When you click *Edit*, a window opens where you can add the code snippet.

For CMS and Thon sites, you can copy the code snippet from Google Analytics and paste it in the text box, or type the code snippet. The text box accepts a maximum of 800 alphanumeric characters.

### ► Add a Google Analytics code snippet to a Web site

Use this procedure to add a Google Analytics code snippet to a Thon or CMS Web site. For a Thon site, you can also access URL information to configure destination goals and funnels in your Google Analytics account and monitor whether website users complete actions on your event website. A destination goal is a reporting tool in Google Analytics that allows you to specify the final page in a series of pages a user visits to complete a transaction such as a registration or donation. When you create a destination goal, you can also specify the steps in the path, known as a funnel, you expect users to take to reach the goal. For a registration, funnel steps include the registration selection, profile information, and billing pages.

#### Prerequisites

- You have administrator access to the account or Virtual Account
- The Web site is already created and you can access it
- The Web site form is already created
- You have a Google and Google Analytics account, and you are signed into these accounts
- You copied the Google Analytics code snippet. For information on how to locate your Google Analytics code snippet, see the Google Analytics help.

#### Starting point:

You are logged into the account or Virtual Account as administrator.

The *Thon* event page is displayed, if not select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

The *Content Management System* page is displayed. If not, select **Content > Content Management System**.

### ► For Thon:

1. Highlight the event's name and select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Add Ons*, click **Google Analytics** to open the *Google Analytics* page.
3. In the **Enter Google Analytics Code Snippet** text box, paste the code. If there's existing code in the text box and you want to replace it, select the existing code and then paste the new code.

**Note:** If you plan to configure destination goals and funnels, the snippet you use must be associated with a property you add to your account specifically for the event website. For detailed information about accounts and properties, refer to the Google Analytics help documentation.

4. Under *Google Destination Goals*, in the **Sphere Form** field, select a form that corresponds to the goal you want to create.
5. Copy the **Destination Goal URL** and paste it into your Google Analytics account. For information about how to add a destination goal to your account, refer to the Google Analytics help documentation.
6. To specify pages for the goal funnel, copy the step URLs under **Funnel Step URLs** and paste them into

your Google Analytics account. For information about how to add funnel steps to your account, refer to the Google Analytics help documentation.

7. Repeat steps 6 through 8 for each destination goal you want to add.
8. Click **Save**.
9. If you use the event template functionality, select whether to allow child events to modify the Google Analytics information and click **Save and Update Child Events**. If you select **Allow child events to modify this section**, the snippet code you enter will not appear in the child events. If you do not select it, the Google Analytics code snippet you enter will appear and the Google Analytics section will not be accessible in child events.
10. To view the code snippet in each Web site page, preview the site in a browser and then select **View > Source** if you are using Internet Explorer (see example figure below). The code snippet is within the `<body>` tag of all site pages. It may be easier to search for a specific word to locate the Google Analytics code snippet.

```
onkeypress="limitGoogleTextAreaCharacters(this)"><script type="text/javascript">
var gajsHost = (("https:" == document.location.protocol) ? "https://ssl." : "http://www.");
document.write(unescape("%3Cscript src='" + gajsHost + "google-analytics.com/ga.js'
type='text/javascript'%3E%3C/script%3E"));
</script>
<script type="text/javascript">
try {
var pageTracker = _gat._getTracker("UA-12300008-2");
pageTracker._trackPageview();
} catch(err) {}</script></textarea>
```

► **For CMS:**

1. Highlight the event's name and select **Manage Website** to open the *CMS Website* page.
2. Select the **Administer** tab and then the **Add-Ons** tab.
3. Click **Edit**.
4. For *Google Analytics*, paste the code. If there's existing code in the text box and you want to replace it, select the existing code and then paste the new code.
5. Click **Update**. You may need to refresh the *Add-Ons* tab to see the code snippet in the Google Analytics text box.

## Google Analytics Ecommerce Tracking and Sphere Web Site Forms

The Google Analytics Ecommerce Tracking feature in Sphere enables you to add a Google Analytics code snippet (see example figure below) to your Thon or CMS site so that you can track and analyze your site's ecommerce transactions.



To track your site's ecommerce transactions, you must enable ecommerce reporting in Google Analytics for your Web site's property, and then copy and paste the Google Analytics code snippet in your Web site forms. Sphere will automatically send Google Analytics the ecommerce data from your Sphere donation, registration, Thon, or eCommerce forms when a supporter confirms the transaction. You can view a report of your site's ecommerce transactions via Google Analytics ecommerce reports. For information regarding Google Analytics Ecommerce Tracking, including how to add ecommerce reporting to your site's profile, see Google Analytics Help.

#### Data Pulled into Google Analytics Ecommerce Tracking Reports

The table below lists the e-commerce data extracted from Sphere and displayed in Google Analytics Ecommerce Tracking reports. The eCommerce (Thon and non-Thon) column shows the data Sphere sends to Google Analytics.

Google Analytics eCommerce Report Fields	Data extracted from Sphere per form type				
	<i>Single/Multi- Step</i>	<i>Single/Multi- Step</i>	<i>Thon Don- ation</i>	<i>Thon Regis- tration</i>	<i>eCommerce (Thon and non-Thon)</i>
	<i>Donation</i>	<i>Registration</i>			
<b>Transactions</b>					
Order Id	Pledge ID	Order ID	Pledge ID	Order ID	Order ID
Affiliation	Web site or form name	Event name	Event name	Web site or form name	Web site or form name
Total	Total gift amount	Total order amount	Total gift amount	Total order amount	Total order amount
Tax					Tax
Shipping					Shipping

City*	City*	City*	City*	City*	City*
State*	State*	State*	State*	State*	State*
Country*	Country*	Country*	Country*	Country*	Country*
<b>Items</b>					
Order Id	Pledge ID	Order ID	Pledge ID	Order ID	Order ID
SKU	Gift	Registration	Gift	Registration	SKU
Product Name	Designation	Registration type	Designation	Registration type	Product name
Category	Fund	Fund	Fund	Fund	Product category
Price	Split amount	Price	Split amount	Price	Price
Quantity	1	Quantity	1	Quantity	Quantity

\* indicates a Sphere required field

#### ► Add a Google Analytics Ecommerce Tracking code snippet to a Web site form

Use this procedure to add a Google Analytics Ecommerce Tracking code snippet to a Web site form to track and analyze the site's ecommerce transactions.

**Note:** Sphere supports Ecommerce tracking for code snippets created before Google Analytics version 3.

#### Prerequisites

- You have administrator access to the account or Virtual Account
- The Web site is already created and you can access it
- The Web site form is already created
- You have enabled ecommerce reporting in Google Analytics for your Web site's profile. For instructions, see Google Analytics help.
- You have copied the Google Analytics code snippet. For information on how to locate your Google Analytics Ecommerce Tracking code snippet, see the Google Analytics help.

#### Starting point:

You are logged into the account or Virtual Account as administrator.

The *Thon* event page is displayed, if not select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

The *Content Management System* page is displayed. If not, select **Content > Content Management System**.



► **For Thon:**

1. Highlight the event's name and select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Add Ons*, click **Google Analytics** to open the *Google Analytics* page.
3. In the *Google Analytics Code Snippet* text box, paste the code. If there's existing code in the text box and you want to replace it, select the existing code and then paste the new code.

**Note:** For information about how to use the information in the *Google Destination Goals* section, refer to [Add a Google Analytics code snippet to a Web site](#).

4. Click **Save**.
5. If you use the event template functionality, select whether to allow child events to modify the Google Analytics information and click **Save and Update Child Events**. If you select **Allow child events to modify this section**, the snippet code you enter will not appear in the child events. If you do not select it, the Google Analytics code snippet you enter will appear and the Google Analytics section will not be accessible in child events.
6. To view the code snippet in each Web site page, preview the site in a browser and then select **View > Source** if you are using Internet Explorer (see example figure below). The code snippet is within the <body> tag of all other pages which make up the site. It may be easier to search for a specific word to locate the Google Analytics code snippet.

```
onkeypress="limitGoogleTextAreaCharacters(this)"><script type="text/javascript">
var gajsHost = (("https:" == document.location.protocol) ? "https://ssl." : "http://www.");
document.write(unescape("%3Cscript src='" + gajsHost + "google-analytics.com/ga.js'
type='text/javascript'%3E%3C/script%3E"));
</script>
<script type="text/javascript">
try {
var pageTracker = _gat._getTracker("UA-12300008-2");
pageTracker._trackPageview();
} catch(err) {}</script></textarea>
```

► **For CMS:**

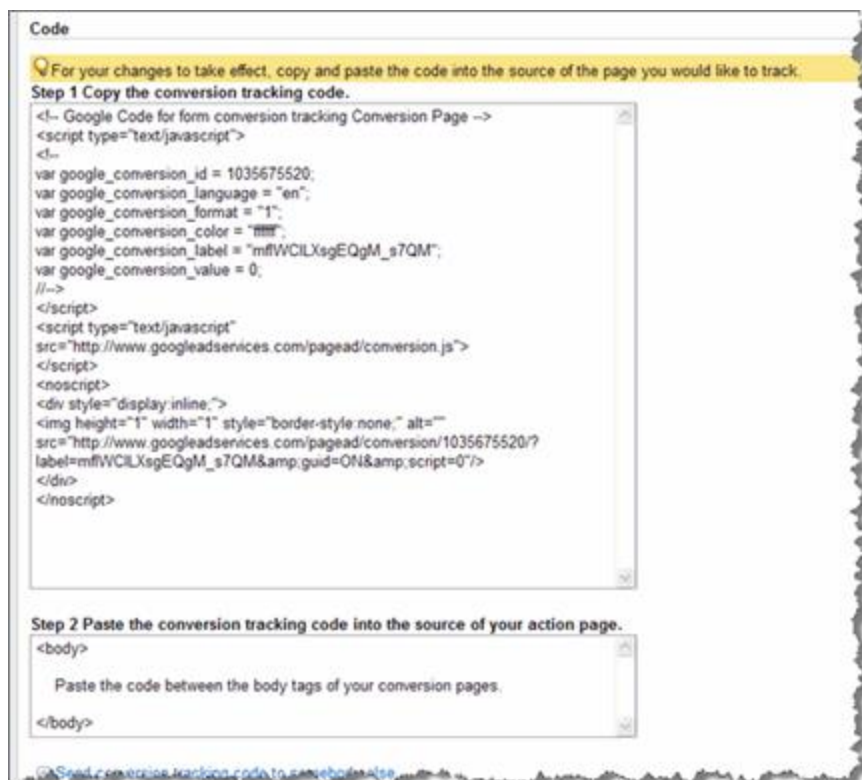
1. Highlight the event's name and select **Manage Website** to open the *CMS Website* page.
2. Select the **Administer** tab and then the **Add-Ons** tab.
3. Click **Edit**.
4. For Google Analytics, paste the code. If there's existing code in the text box and you want to replace it, select the existing code and then paste the new code.
5. Click **Update**. You may need to refresh the *Add-Ons* tab to see the code snippet in the Google Analytics text box.

## Google AdWords Conversion Tracking and Sphere Web Sites

The Google AdWords conversion tracking feature in Sphere enables you to add a Google AdWords code snippet (see example figure below) to your Thon or CMS Web site forms (donation, registration, Thon, and eCommerce) so that you can:

- Measure the effectiveness of Google keywords searches to your site
- Measure the number of advertisements visitors click on your site

Adding Google AdWords conversion tracking to a site enables you to track which of the above methods generates more interest. When site visitors click an advertisement on your site, Google AdWords conversion tracking places a cookie on their computers.



To use Google AdWords, you must sign in to your organization's Google AdWords account and create a campaign to promote the site. To track site success, set up Google AdWords conversion tracking and then copy and paste the conversion tracking code snippet in your Web site forms. Sphere will add the code snippet within the <body> tag of all receipt pages so that Google AdWords can log successful conversions. If you do not have a Google and Google AdWords account, or want to learn more about Google AdWords and how to use conversion tracking, visit [www.google.com](http://www.google.com) or see the Google AdWords Help.

**Note:** In order to paste a Google AdWords conversion tracking code snippet in a Web site, you need access to the Web site and form. If the form is a template that will be used by child accounts, the code snippet will be automatically added to all site receipt pages created using the template.

### Enabling Users to Add a Google AdWords Conversion Tracking Code Snippet to a Site

Users must be able to access the donation, registration, eCommerce, or Thon form in Sphere in order to access the Google AdWords conversion tracking feature.

If...	Access to the Google Conversion Tracking feature is...
The Thon site form is already created or is new	Automatic  By default, users with (System) functional access who can access Sphere have full functional access to Website

	<i>Info</i> , from within which users can access <i>Customize Forms</i> and then the Google Conversion Tracking feature for the form. If a user is assigned a custom functional access and you want that functional access group to be able to access <i>Website Info</i> , you must assign <i>Full Access to Website Info</i> for the custom privilege group.
The eCommerce, donation, or registration form is already created or is new	Automatic  By default, users with <i>(System)</i> functional access who can access Sphere have full functional access to <i>Website Info</i> , from within which users feature for the form access <i>Form Customization</i> and then the Google Conversion Tracking feature for the form. If a user is assigned a custom functional access and you want that functional access group to be able to access <i>Website Info</i> , you must assign <i>Full Access to Website Info</i> for the custom privilege group.

#### ► Add a Google AdWords conversion tracking code snippet to a Web site

Use this procedure to add a Google AdWords conversion tracking code snippet to a Web site so that you can measure the effectiveness of Google keyword searches to the site, and the number of advertisements visitors click on the site.

##### Prerequisites

- You have administrator access to the account or Virtual Account
- The Web site is already created and you can access it
- The Web site form (initiative) is already created
- You are signed into your Google AdWords account, created a campaign, and copied the conversion tracking code snippet. For specific instructions, see the Google AdWords help.

#### ► To add a Google AdWords conversion tracking code snippet to a Web site

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator.  One of the following pages is displayed:
------------------------	--

The *Thon* page is displayed, if not select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

The *Single Step* or *Multi-Step Donation* page is displayed. If not, select **Communities > Forms > Single Step (or Multi-Step) Donation**.

The *Registration* or *Multiple Registration* page is displayed. If not, select **Communities > Forms > Registration (or Multiple Registration)**.

The *Content Management System* page is displayed, if not select **Content > Content Management System**.

The *Ecommerce* page is displayed. If not, select **Commerce > Ecommerce**.

► **For Thon forms:**

1. Highlight the event's name and select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Add Ons*, click **Customize Forms** to open the *Customize Forms* page.
3. Under *Website Forms*, click **Select** for the donation, registration, or eCommerce form to which you want to add the Google AdWords conversion tracking code snippet.
4. In the resulting page, click the **Google Conversion Tracking** link.
5. Paste the code snippet in the text box.
6. Click **Save & Done** or **Save & Preview**.

If you preview the form, you will see a small conversion tracking image. Site visitors will see this image when they complete the form.

► **For Ecommerce or standalone donation and registration forms:**

1. Highlight the form's name and select **Website Info** to open the *Webinfo Checklist* page.
2. Click **Form Customization**.
3. Under *Website Forms*, click **Select** for the form to which you want to add the Google AdWords conversion tracking code snippet.
4. In the resulting page, click the **Google Conversion Tracking** link.
5. Paste the code snippet in the **Google AdWords Conversion Tracking** text box.
6. Click **Save & Done** or **Save & Preview**.

If you preview the form, you will see a small conversion tracking image. Site visitors will see this image when they complete the form.

► **For CMS forms:**

**Note:** When you add a link to a Web site form in CMS, you are pointing to an existing form. You do not create the form in CMS. To add a Google AdWords conversion tracking code snippet to a form that you will use in a CMS Web site, you must add the code snippet to the form outside of CMS. See the steps above for details.

1. Highlight the event's name and select **Manage Website** to open the *CMS Website* page.
2. Select the **Content Management** tab. The page refreshes, and the *Site Structure* tab is in focus. Make sure it is in *Website* view.
3. Click **New**, and then select **Forms**.
4. In the *New Form* pop-up window, select the registration or donation form type and then click **Continue**.
5. In the right side of the resulting page, click **Select** for *Link Location*. A pop-up window opens, informing you to select where on the CMS Web site page to include the form's link. **Do not click Cancel.**
6. In the left side of the page, expand to where you want to include a link to the form and then in the pop-up menu select where to place it.
7. In the right side of the page, click **Create**.
8. In the left side of the page, verify that the form link is added where you indicated.
9. Click the **Website** link for *View* to preview the site in Sphere.
10. Click the form's link to make sure you can preview it.

## Monitoring and Analyzing Site Traffic with Google Analytics, Google Analytics Ecommerce Tracking, and Google AdWords

After you add a Google Analytics, Google Analytics Ecommerce Tracking, or Google AdWords Conversion Tracking code snippet to a Web site, go to those sites to analyze the data Google collected. If you have questions, see the appropriate Google Help.

### Monitor and analyze site traffic with Google Analytics and Google AdWords conversion tracking

For details, follow the instruction in the Google Analytics and Google AdWords Conversion Tracking help.

## Smartphones and Events Overview

Allow supporters to make charitable contributions or register for the event from their smartphone by enabling smartphone detection for the specific Thon event site. Supporters can initiate a mobile donation when they receive a Twitter tweet, Facebook status update, or text message on their smartphone from event participants and then click the link to go to the participant's personal or team page. Supporters can initiate a mobile registration when they use a mobile device to click a registration link from the event website, or a participant's personal or team page.

The mobile personal and team pages conform to smartphone standards, can be viewed in portrait or landscape mode, and support screen width 480 x 360 and up to 640 x 480. After supporters complete and submit a mobile form, the transaction is processed as usual and Sphere sends a confirmation E-mail.

For certain smartphones, Sphere detects the screen width and sets the pages accordingly. For all other smartphones, Sphere uses a default width of 240 pixels.

## Mobile Personal Page and Mobile Form Overview

When you create a personal page for website users to view on a smartphone, limit the number of graphics and text you add to the page because of mobile device memory limitations and screen size capabilities. When supporters view the mobile personal page, they will see the picture, story, goal, amount achieved, and donate link you add to the page. Similarly, we also recommend you include a minimal number of fields on mobile forms. When you include fewer fields, you increase the number of people who complete the form.

**Note:** Currently, YouTube videos are not supported in mobile personal pages. If you add a link to a YouTube video in the mobile personal page, Sphere displays the default image for the event in the personal page and adjusts the page to fit the smartphone's viewing area.

The mobile donation form accepts mobile donations from individuals. Other types of donations such as organization, offline, pledge, and matching gifts are not supported.

Website users can use the mobile registration form to sign up as individuals, start teams, or join teams. They can also join teams that are associated with event groups when the event uses them. The mobile form provides the same features as the desktop version, so it provides registrants the option to enter their social media login credentials when they complete the form, and links returning registrants with their previous supporter records. Also, returning registrants who share email addresses can select the supporter record to use when they register for events.

If you enable multiple or family registration, registrants who select those options must click a link from the mobile registration form and use the desktop form to sign up. Also, users must click a link from the mobile confirmation page to configure headquarters features.

**Note:** The mobile registration form does not currently support installment payments.

### Fields in Mobile Forms

The table explains the fields in mobile donation and registration forms.

Field Type	Summary
Standard Profile Fields	<p>By default, the following fields are set to Required and can be changed:</p> <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name (this field is always required)</li> <li>• Email</li> </ul> <p>By default, the following fields are set to Active and can be changed:</p> <ul style="list-style-type: none"> <li>• Address Line 1</li> <li>• Address Line 2</li> <li>• City</li> <li>• State</li> <li>• Province</li> <li>• ZIP/Postal Code</li> <li>• Country</li> <li>• County</li> </ul>

	All other fields are set to Inactive and can be changed.
Custom Profile Fields	Supported for smartphones.
Standard Event Fields	By default, all fields except <i>Matching Gifts</i> information are set to <i>Inactive</i> and can be changed.  Matching Gifts and donor designations are currently not supported for mobile donation forms.
Custom Event Fields	Supported for smartphones.

### Changing Field Settings

For the fields you can change, you can set them to the following:

- *Active* if you want to show the field on the form but not make it a required field.
- *Required* if you want to show the field on the form and make it a required field.

If you cannot change the status of a field, it is because the field is not available for smartphones. For example, *Matching Gifts* is currently not supported and you cannot change the field's status.

## Enabling Smartphone Detection for an Event Site

To allow supporters to make donations and register from their smartphones for a specific Thon event, you must activate the mobile donation and registration forms. If necessary, you can also customize the forms.

Enable the smartphone functionality via *Website Features*. By default, the check boxes to activate the mobile home page and forms are selected for all new Thon event sites. If you want to enable smartphone functionality for existing events, you must manually update them.

**Detect and forward Mobile Devices to Mobile Forms**

Enable mobile optimized pages and forms when users access the website from a smartphone or tablet.

To enhance the usability of mobile forms, we recommend you configure them to include a minimal number of fields. Configure mobile forms from the *Customize Forms* section of the *Webinfo Checklist*.

☒ **Mobile Donation Form**  
☐ **Mobile Home Page and Mobile Registration Form**

To customize the mobile forms, select *Customize Forms* from the event's *Webinfo Checklist*. Access the *Mobile Donation Form* and *Mobile Registration Forms* under *Website Forms*. When you click *Select* for the form types, you can activate and require all fields you want to show on the mobile forms. Due to smartphone memory

limitations, limit the number of fields you include in mobile forms. Some smartphones configurations may fail if you include too many fields on the form.

### ► Enable smartphone detection for an event site

Use this procedure to enable smartphone detection for a Thon event site.

**Note:** This feature is currently only available for Thon events.

#### Prerequisites

- You have administrator access to the account or Virtual Account
- The Thon event site is already created and you can access it

<b>Starting point:</b>	<p>You are logged into the account or Virtual Account as administrator.</p> <p>The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Event Customization*, click **Website Features** to open the *Website Features* page.
3. Under **Detect and forward Mobile Devices to Mobile Forms**, select the check boxes for **Mobile Donation Form**, and **Mobile Home Page and Mobile Registration Form**. The **Mobile Donation Form** checkbox is selected by default for all new Thon event sites.
4. Under *Donation Buttons*, specify the donation levels for the mobile form buttons. Donation level amounts appear as buttons on mobile phones to make them easier for users to select. On registration forms, the buttons appear in the *Additional Donations* section. On donation forms they appear under **Select Amount**. Select:
  - **Use event donor giving levels** to use the event's donation levels. If necessary, click **Configure** to define the event levels.
  - **Use custom buttons** to use custom amounts that are specific to the mobile form, and then enter the amount to appear for each button. You can enter amounts for up to seven buttons. For example, enter custom amounts when the minimum donation amount you accept is lower for the mobile form.

**Note:** Buttons do not appear if you do not configure event levels or enter values for custom buttons.

5. Click **Save** to update the event site and to refresh the *Webinfo Checklist* page.
6. Click **Webinfo Checklist** in the [Breadcrumb](#).
7. Verify that **Website Features** contains a check mark.
8. Click **Update Your Event Now**.
9. Confirm the site update.

#### To disable smartphone detection

1. Click **Detect and forward Mobile Devices to Mobile Donation Form** to remove the check mark.
2. Perform steps 5 to 8 above.



## ► Create a mobile form

Use this procedure to create a donation or registration form that will display on smartphones and tablets when site visitors access a Thon event site.

### Prerequisites

- You have administrator access to the account or Virtual Account
- The Thon event site is already created and you can access it

**Starting point:** You are logged into the account or Virtual Account as administrator.  
The *Kintera Thon* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Website Info** to open the *Webinfo Checklist* page.
2. Under *Add Ons*, click **Customize Forms** to open the **Customize Forms** page.
3. Under *Website Forms*, click **Select** for *Mobile Donation Form* or *Mobile Registration Form* to display the *Field Selection* page.  
In the *Field Selection* page, you can customize *Standard Profile Fields*, *Standard Event Fields*, and *Custom Event Fields* for mobile donation forms.
4. Complete the steps below to create the mobile form.

### Step 1: Select form fields

Although you can add as many fields as you want to a mobile form, we recommend that you limit the number of fields to only the ones necessary to collect donation and registration information from site visitors. This is due to smartphone memory limitations. Additionally, when you select *Standard Event Fields* for the mobile donation form, you cannot change the settings for *Matching Gifts*, which are set to *Inactive* because the form does not currently support matching gifts or multiple donor designations.

**Note:** The mobile donation form currently does not support the primary and secondary photo profile fields.

1. For each field on the *Standard Profile Fields*, *Standard Event Fields*, and *Custom Event Fields* tab, select one of the following options. If a field is grayed out, it may be a system-required field that you cannot change or a field that requires additional settings before you can select it. For example, *Last Name* is a system required field on a donation form.
  - Click **Inactive** if you do not want the field to appear on the form.
  - Click **Active** if you want the field to appear on the form, but not make it a required field.
  - Click **Required** if you want the field to appear on the form, and make it a required field. An asterisk (\*) appears next to the field's name on the form to indicate it is required.
  - The **Read-only** column is grayed out for Thon events.
  - The **Read-only on profile form** is available only in Thon and only for *Start a Team*, *Join a Team*, and *Join as Individual* forms.

**Note:** This option does not appear when you configure the *Mobile Registration Form* because it uses the **Read-only on Profile Form** selections from the *Start a Team*, *Join a Team*, and *Join as Individual* forms.

- **Data Type** shows the type of information the field accepts. For example, a visitor can enter text in a text box, select an item from a menu, select a check box, or select an option.
  - Click **Set Default** to establish a default for a field. In the resulting window, enter the default information you want to appear in the form field. For example, if you want the default for the field Title in Standard Profile Fields to always be Mr., then you would select Mr.
2. Click **Save** to accept the changes and to display the *Add-Ons* page.
  3. Enable segmentation and eNewsletter options on the mobile donation form as described in step 2 below.

### Step 2: Enable segmentation and eNewsletter options on a mobile donation form

**Note:** Segmentation and eNewsletter settings are optional. If you do not want to enable these options, go to step 4 in this procedure.

1. In the *Add-Ons* page, if there are segments or eNewsletters options, add them to the mobile donation form as follows:
  - a. For *Segmentation Selection*, click **Hierarchical Tree Structure** or **Column Structure** to specify how segments will appear on the mobile donation form. Segments appear under *Your Interest Area* (you can change this label later).
  - b. Expand the appropriate segment or auto-segment category, and then select the check box for the segment you want to add to the form. It will be added to the *Display Order for Segment Categories* or *Currently Selected Autosegment Categories* text box.
  - c. Repeat these steps for all segments you want to add to the mobile donation form.
2. To show the *eNewsletter Sign-up* field on the form, click **Active** for the *eNewsletter*. This is the default setting. Or, click **Inactive** if you do not want to show the field on the form.

**Note:** The eNewsletters you select will appear under *Subscribe to our eNewsletter!* on the mobile donation form. You can change this label.

3. Select the **double opt-in** check box if you want donors to confirm signing up for an eNewsletter.
4. Click **Save** to accept the changes and to display the *Field Order and Label Text* page.
5. Specify how fields will appear on the mobile donation form, and add labels to field groups as described in step 3 below.

### Step 3: Specify how fields will be displayed on the mobile form

The fields you show on the form will be grouped according to the type of information being collected (for example, donor's personal information such as a name, address, phone; payment information; billing address; and so on). You can change the title (label) for each form group, as well as add additional spacing and a horizontal line below each group to separate the information and make the form visually appealing.

1. In the *Field Order and Label Text* page:
  - a. For *Form Description*, enter any information you want to add to the beginning of the mobile form (for example, what the form is for).
  - b. For *Form Title*, enter the label that will appear at the top of the form.
  - c. For each form field group (for example, *Supporter*, *Payment* fields, and so on), enter the

appropriate label you want to show on the form. If you are used to seeing a field group in a donation form and do not see the group in the mobile donation form, it is because it is not supported for mobile donation forms.

- d. Select the **Insert Line Separator** check box if you want to separate each field group on the form with a horizontal line, and then specify the line's length by percentage (25% is a short line that is centered on the form, and 100% extends the line horizontally across the form).
  - e. Select the **Insert Line Breaks** check box if you want to add spaces after the horizontal line, and then select the number of spaces.
  - f. For *Section Note*, enter descriptive text that will appear below the field group's label. First select a field, and then use **Top**, **Move Up**, **Move Down**, and **Bottom** to reposition it.
  - g. For *Form Footnote*, enter the information you want to show at the bottom of the form (for example, Thank you for your donation).
  - h. For *Submit Button Label*, enter a new label for this button if necessary.
2. If you will track the mobile donation form with Google Analytics Ecommerce Tracking, paste the code snippet in the *Google AdWords* text box. For instructions, see Add a Google Ecommerce Tracking code snippet to a Web site.
  3. Click **Save** to accept the changes and to display the form *Preview* page.
  4. Preview the form to make sure it is accurate. To make changes, click the browser's **Back** button.
  5. When you are satisfied with the form, click the **Confirmation** link (not the *Confirm* button) to open the *Confirmation* page and set up E-mail confirmation as described in step 4 below. If you click *Confirm*, you will return to the *Webinfo Checklist*.

#### Step 4: Set up E-mail confirmations

1. In the *Confirmation* page, if you want to send a donation confirmation E-mail to supporters leave the **Do not send eMail confirmation for this form** check box unselected. By default, it is not selected.
2. Click **Save** to accept the change and to display the *Customize Forms* page.
3. Update the event site as described in step 5 below.

#### Step 5: To update the event site

1. Click **Webinfo Checklist** in the Breadcrumb.
2. In the *Event Website Creation Checklist*, verify that **Customize Forms** contains a check mark.
3. Click **Update Your Event Now**.
4. Confirm that you want to update the event.
5. Preview the site to make sure it is complete with the information you want site visitors to see or access.
6. Test the mobile donation form using a smartphone.

#### ► Create a report that filters mobile donations or registrations

Use this procedure to create a report that filters donations or registrations made from a smartphone.

#### Prerequisites

- You have administrator access to the account or Virtual Account
- The Thon event site is created
- A donation or registration was made via a smartphone and the transaction is recorded in the Sphere CRM database

<b>Starting point:</b>	You are logged into the Sphere account or Virtual Account as administrator. The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Reports** to open the *Reports* page.
2. For *Run quick report*, select **People: All Donors** for a mobile donation report, or **People: Participant Detail** for a registration report.

**Note:** If you are creating a donation report from *Report Center*, select **Initiative All Donor Report** for *Event Management*.

3. Click **Run Report** to open the *Customize* page.
4. For *Select Transaction Date Range*, select the date range for the report.
5. For *Customize Report*, filter the report to include donations from smartphones by entering the information below for Group:
  - a. In the left selection box, select **Donation From Mobile Device** for a mobile donation report, or **Registered by mobile** for a registration report.
  - b. In the middle selection box, select **Equals**.
  - c. In the third text box, enter **Yes**.
6. Click **Next**.
7. On the resulting page, select the check box for **Donation From Mobile Device** or **Registered by mobile** and any other fields you want to include in the report.

**Note:** If you are creating a donation report from *Report Center*, for *Choose Data*, select the **Donation From Mobile Device** check box.

8. For *Show columns...*, arrange the columns in the order you would like them displayed in the report.
9. For *Sorting Preference*, specify how you want the report to be sorted.
10. Click **Finish**.
11. In the *Report Preparation* page, specify when to run the report (immediately or in the background so that you can continue to use Sphere).

**To run the report immediately**

- a. Click **No – Run the report immediately and wait for it to complete**.

When you select *No*, all fields listed under the *Yes* option will be grayed out.

**To run the report in the background and be notified via E-mail when it is ready**

- a. (Default) Click **Yes**, or verify that it is selected.
- b. For *Report Name*, enter a name for this report.
- c. The *eMail Notification* text box contains the E-mail address of the person logged into the account, and the report will be sent to this address. If necessary, enter a different E-mail address.
- d. For *eMail Message*, enter any message you want to communicate to recipients when they receive the E-mail notification.
- e. For *Report Format*, click one of the following options:
  - Click **Excel** if you want the report results to be formatted in Microsoft Excel format. It will be saved with file extension .xls.
  - Click **CSV** if you want the report results to be formatted as comma separated value (CSV). The report will be saved with file extension .csv.

12. Click **Run Report**.

If you clicked *No* in step 9 above, the report page opens, showing all donations or registrations made via smartphones.

If you clicked *Yes*, a message appears to inform you that the report was submitted and will be processed in the background. How long processing takes depends on network traffic or the amount of information the report will contain. After processing, the system sends a notification to the E-mail address specified in *eMail Notification* above, and includes a link for accessing the report. Save the report where you want, or download and view it immediately.

13. Save and view the report as follows:

- a. To save the report, click **Save** and then in the resulting page:
  - i. For *Name*, accept the default name or enter a new name. The default name is the name specified in step 5 above.
  - ii. For *Description*, enter a brief description that will help you to identify the report.
  - iii. Click **Save**.
- b. To download the report in the format saved, perform the following steps:
  - i. Click **Download Here** for the appropriate report.
  - ii. In the pop-up window, click **Open** and then confirm that you want to open the report in the format saved in step 5 above.

**Note:** When you view a mobile donations or registrations report, the *Donation from Mobile Device* or *Registered by mobile* column in the report includes *N* for all transactions that were not made from a smartphone, and *Y* for all transactions made from a smartphone. If there were previous transactions in the database before the smartphone implementation, the columns display *N* for these existing transactions.

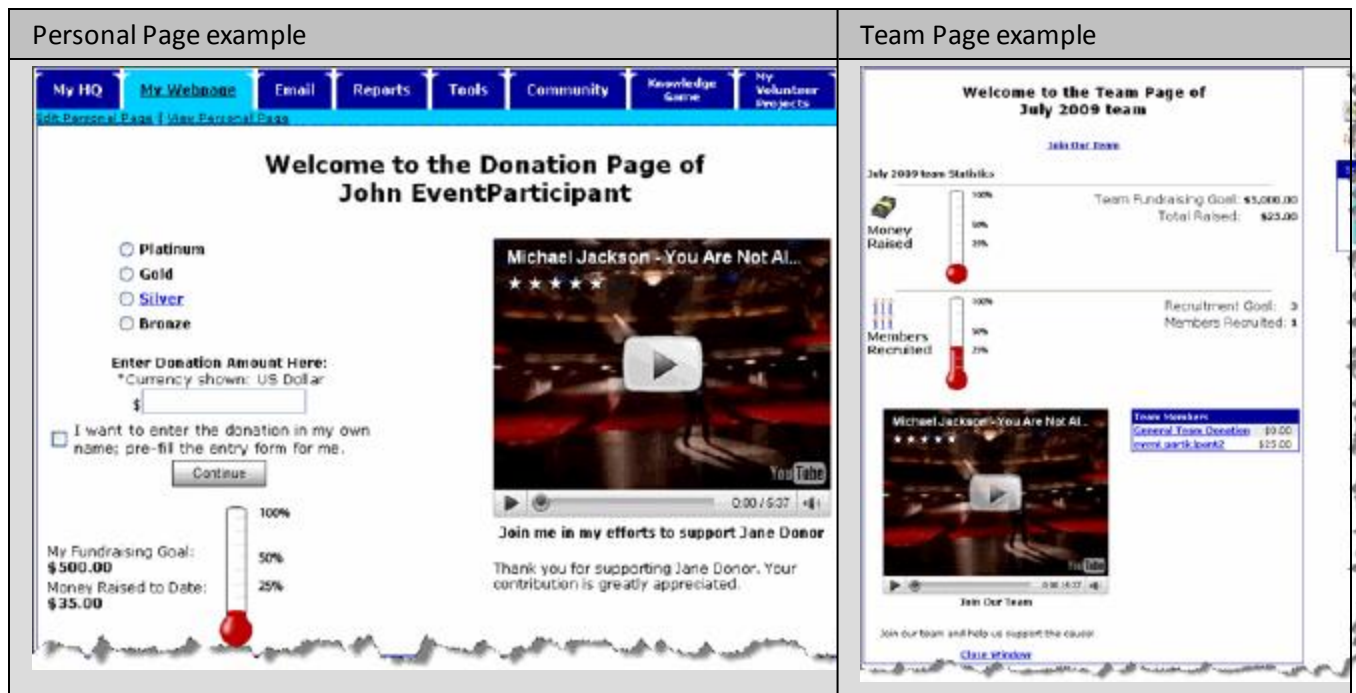
## Transaction Processing and Smartphones

Sphere currently supports credit card transactions for donations and registrations made from smartphones, and processes transactions through Visa, MasterCard, Discover, and American Express. See the General Specifications of the online Help file for a list of payment processors and payment gateways supported.

# YouTube Videos in Thon Event Sites Overview

Build a YouTube™ video library from which participants can select videos so that they can more effectively promote their personal or team pages and increase fundraising possibilities. The *YouTube* functionality in Sphere enables participants to link to a video from your organization's YouTube video library, or link to their own YouTube video.

When added to a personal or team page, YouTube videos play in an embedded Flash player (see figure below).



The YouTube video implementation in Sphere conforms to YouTube specifications. You can add videos created in the following file formats to the video library for viewing in the embedded Flash player in Sphere:

- AVI (Audio Video Interleave) inherent in Microsoft Windows
- .MOV (QuickTime) inherent in Macintosh
- 3GP (Cell phones)
- .MPEG (Movie Picture Experts Group)
- .FLV (Adobe Flash)
- .SWF (Shockwave Flash)

Create all YouTube videos outside of Sphere, and then provide their YouTube URL when you add them to the video library.

## Enabling YouTube in a Thon Event Site

Allow participants to link to your organization's YouTube videos, or link to their own videos, in their personal or team page by enabling the YouTube functionality for the specific Thon event site using *Image and Text Library for Page Customization* in the Webinfo Checklist. When you enable YouTube videos, the system adds the *Webpage video* field to the participants' personal and team pages. If you enable videos *and* images, the system also adds the *Do you want a Video or Image* field to the personal and team pages (see figure below).

**My HQ** **My Webpage** **Email** **Reports** **Tools** **Community** **Knowledge Game**

[Edit Personal Page](#) | [View Personal Page](#)

### Edit your Personal Page

**Header Text:**

**Line 1:**  
Welcome to the Donation Page of

**Line 2:**  
Jane Participant

**Do you want a Video or Image?** Video ▾

**Webpage video**  
You may use the default video or [select](#) a video from the library or [upload](#) your own.

**Choose a theme**  
Customize your page with fun backgrounds.  
Standard ▾

**Preview webpage**  
View your page as others will see it!  
[Preview](#)

[Finish](#) [Continue](#)

When you enable YouTube functionality for a Thon event site, you can:

- Allow participants can link to your videos in their personal or team pages.
- Allow participants to link to (upload) videos from YouTube from their personal or team pages.

In order for participants to access the videos, you must:

- Add the videos to the standard video library.
- Enable participants to access the videos when they log into their personal headquarters and view their personal or team pages.

### ► Enable YouTube in a Thon event site

After you enable YouTube videos, specify whether you will allow participants to link to your videos (or other videos from YouTube) from their personal or team pages.

#### Prerequisites

- The *Events* or *Advanced Events* feature is enabled in the account
- You have *Administrator (System)* functional access to the account or Virtual Account
- The Thon event site (initiative) is already created

**Starting point:** You are logged into the account or Virtual Account as administrator.  
The *Kintera Thon* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select Website Info. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Under *Manage videos*, select the check box for **Allow participants to add a YouTube Video to their personal page** to allow participants to add links to videos in their personal or team pages. The check boxes will be grayed out if you do not select the *Allow participants to add a YouTube Video to their personalpage* check box.
4. Select the following options:
  - Select the check box for **Allow linking only to video options set by organization** if you want to allow participants to only select your organization's videos from the video library.
  - Select the check box for **Allow linking to video options selected by the participant** if you want to allow participants to add video links from YouTube in their standard video library. When you select this check box, the system adds the *Webpage video* field to the personal and team pages. If you enable images and videos in a Thon event site, the system also adds the *Do you want a Video or Image?* field to the personal and team pages.

**Note:** If you select the two linking check boxes and then deselect *Allow linking only to video options set by organizations*, the system also deselects *Allow linking to videos* selected by participants.

5. Click **Save**.

## Managing YouTube Videos

When you build a YouTube video library in Sphere, participants can access the videos you allow them to access. The videos in the library physically reside on the YouTube Web site and not the Sphere database. Sphere only maintains a record of a video's YouTube link (its URL). When the video is accessed (either from a participants personal or team page, or from *Manage Videos*) Sphere will display the video according to its YouTube URL in the embedded Flash player.

#### What You Can Manage



After you add YouTube videos to the video library, you can:

- Prevent participants from being able to access videos.
- Prevent participants from being able to access videos without deleting them from video the library.
- Prevent participants from being able to link their own YouTube videos.
- Change the default video.
- Test videos in the embedded Flash player.

### Enabling Participants to Access and Link to YouTube Videos

To enable participants to access your organizations' videos and link to them from their personal or team page, you must:

- Enable adding of YouTube videos, and also linking to the videos.
- Add videos to the video library. The system automatically sets the first video you add as the default. You can change the default video at anytime, but can only set one video as default.
- For each video you add to the library, provide its YouTube URL. When participants access their standard video library from a personal or team page, they will see the list of videos you allow them to see.
- Give the video a name. This name is important, as it will appear next to the video in the Name column in the standard video library to help participants identify the video. After you add a video to the library, you can only change its name by first deleting the video and then adding it again to the video library.
- Determine which video will be automatically selected (the default video) when participants access the standard video library. You can change which video is default at any time. If participants do not change which video will be used automatically in their personal or team page, your default video will be used.

**Note:** When images and videos are enabled for a Thon event and participants use an image in their personal or team page instead of a video, the default video you specify will not overwrite their default image.

- Determine whether you will allow participants to link to their own videos.

### How Participants Use YouTube Videos

When visitors access a participant's personal or team page, the YouTube video will automatically play in the embedded Flash player. If a video is no longer available on YouTube (or if YouTube only allows viewing of a video from its Web site), participants will receive a message when attempting to play the video.

When participants click to select, and link to, a video in their personal or team pages:

- The standard video library opens.
- Participants select the video to which they want to link.
- We add a link to the video in their personal or team page.

- Participants can preview or play the video in the embedded Flash player.

If participants click to link a video directly from YouTube in their personal or team page:

- The Add or select video page opens.
- Participants enter the URL for where the video is located on YouTube; or can go directly to the YouTube Web site to locate the video they want to link to; and then copy, paste, and submit the URL to add the video to their video library. Participants can copy the link from the address bar of the browser when they view the video, or from the video's page on YouTube.

**Note:** Sphere does not support the option in YouTube to copy the video URL at the current time.

- Participants can only link to one video to their video library at a time. Each time participants want to link to another video, they must first delete the current video by clicking Delete and then confirm the delete. Additionally, if participants want to return to the list of videos you added to the standard video library, they must first delete the linked video in order to return to the standard video library.

#### ► Prevent participants from linking to a YouTube video from their personal and team pages

Use this procedure to disable the YouTube video option in a Thon event site, and prevent participants from linking to videos in their personal or team pages. You can prevent participants from linking to your organization's YouTube videos or those they link to from YouTube.

##### Prerequisites

- YouTube video is enabled for the Thon event site
- You have *Administrator (System)* functional access to the account or Virtual Account
- The Thon event site is created

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator.  The video library is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> . Then, highlight the event's name and select <b>Website Info</b> . And finally, click <b>Image and Text Library for Page Customization</b> under <i>Event Customization</i> .
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##### To prevent participants from linking to a YouTube video from their personal or team page

1. Click **Allow participants to add a YouTube Video to their personal page** to remove the check mark.

If you remove the check box for *Allow participants to add a YouTube Video to their personal page* while the two *linking* check boxes are selected, the system automatically removes the *linking* check boxes.

2. Click **Save**.

##### To prevent participants from linking to your organization's YouTube videos from their personal or team pages

1. Click **Allow linking only to video options set by organization** to remove the check mark.
2. Click **Save**.

#### To prevent participants from linking to any YouTube videos from their personal or team pages

1. Click **Allow linking to videos selected by the participant** to remove the check mark.
2. Click **Save**.

#### ► Set the default YouTube video

Use this procedure to specify which YouTube video will be automatically selected (the default video) in participants' standard video library. This video will play in a participant's personal or team page if they do not select a different default video.

**Note:** When you add videos to the library, the system automatically sets the first video you add as the default. You can change the default video at anytime, but can only set one video as default.

#### Prerequisites

- You have added Tube video to the video library
- You have *Administrator (System)* functional access to the account or Virtual Account

<b>Starting point:</b>	<p>You are logged into the account or Virtual Account as administrator.</p> <p>The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Click **Manage videos**. The *Manage YouTube Videos* window opens.
4. For *Personal Page* and *Team Page*, select the Default check box for the video you want to be automatically selected when participants access the video library from their personal or team page. Participants can change this default from their standard video library.

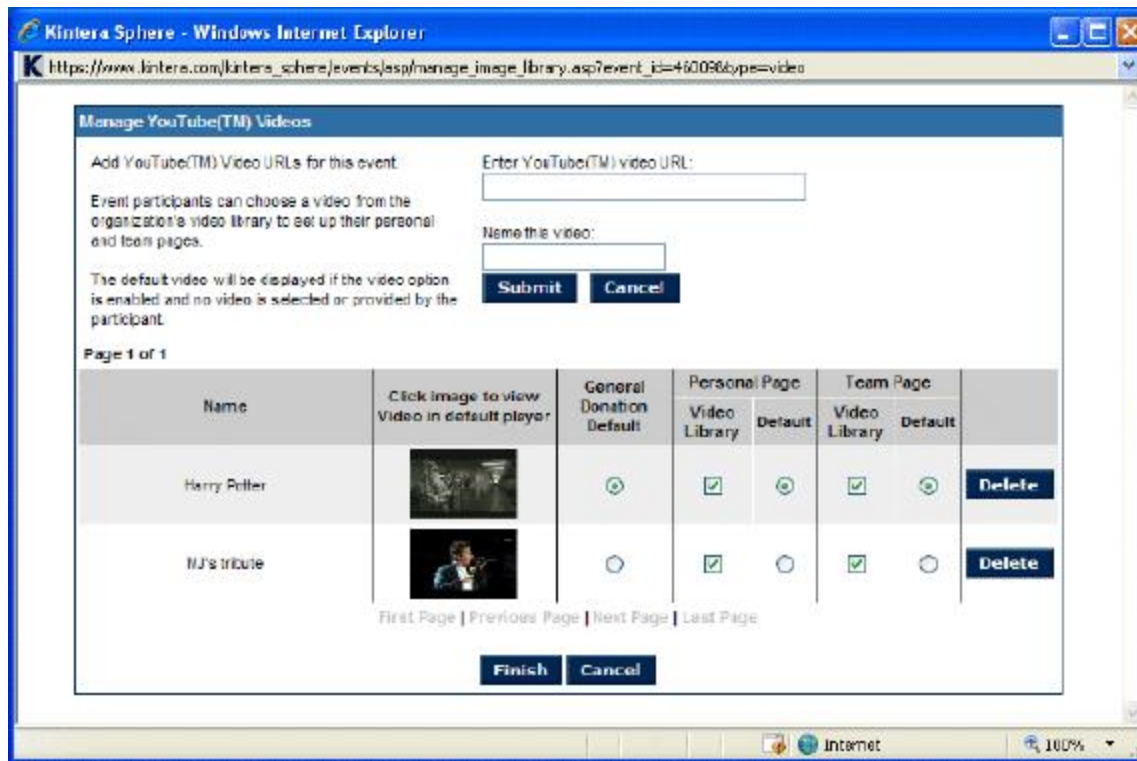
**Note:** You can only set one video as default, and this video will be the default video until you change it. The system automatically selects the Default option for the first video you add to the library. Additionally, when images and videos are enabled for the Thon event and a participant uses an image in their personal or team page instead of a video, the default video you specify will not overwrite their default image.

5. Click **Finish** to close the *Manage YouTube Videos* page and return to the *Image and Text Library* page.
6. Click **Save**.

## Adding YouTube Videos to the Video Library

Add YouTube videos to the video library to enable participants to link to the videos from their personal or team pages (see figure below). When you add a video to the library (see figure below), participants can access them

from their standard video library when they log into their personal headquarters.



**Note:** If you enable linking to videos but do not add videos to the standard video library, the Submit and Preview buttons in participants' personal or team pages will be grayed out. Additionally, when you (or participants) preview a personal or team page, a message stating that no videos were found in the video library will be displayed in the embedded Flash player.

After adding videos to the standard video library, you can:

- Control which videos participants can see in the standard video library when they log into their personal headquarters by selecting (or deselecting) the *Video Library* check boxes for *Personal Page* and *Team Page*.
- Specify which video will be selected automatically and displayed in personal and team page, the default video. The system automatically sets the first video you add to the library as the default video. You can change the default video when necessary, but can only set one video as default at a time.

**Note:** After you add a video to the library, you can only change its name by first deleting the video and then adding it again to the video library.

### When Participants Link to Videos to the Video Library

If when you enabled YouTube for a Thon event you allowed participants to link to their own YouTube videos, they can link to them from their personal or team page.

Participants can only link to one video at a time to their video library. If they delete a video from their video library, they will continue to have access to the default video you add (and make available) in the standard video library.

### ► Add YouTube videos to the Video Library

Use this procedure to add YouTube videos to the video library so that event participants can access and link to a selected video from their personal and team pages.

**Note:** If you enable YouTube videos in a Thon event site and do not add videos to the standard video library, the *Submit* and *Preview* buttons in participants' personal or team editing pages will be grayed out. Additionally, when you or participants preview a personal or team page, a message stating that no videos were found in the video library will be displayed in the embedded Flash player.

#### Prerequisites

- YouTube video is enabled for the Thon event site
- You have *Administrator (System)* functional access to the account or Virtual Account
- You have enabled the option that allows participants to link to YouTube videos

<b>Starting point:</b>	<p>You are logged into the account or Virtual Account as administrator.</p> <p>The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Click **Manage videos**. The *Manage YouTube Videos* window opens.
4. For *Enter YouTube video URLs for this event*, enter the URL for the video, or copy the URL from the YouTube site and then paste it in this text box. You can copy the link from the address bar of the browser when you view the video, or from the video's page on YouTube.
5. For *Name this video*, enter a name that will help you (and your event participants) to easily identify the video (up to 23 characters).
6. Click **Submit**.

**Note:** The system will retrieve the video at the specified URL and will display a thumbnail of the video under Click image to view Video in default player. If you provided an invalid URL, the thumbnail will not be displayed.

7. Repeat steps 4 to 6 for all videos you want to add to the video library.
8. Specify which videos participants will be able to access from their standard video library as follows:
  - a. For *Personal Page* and *Team Page*, select the **Video Library** check box for all videos to which you want participants to have access when they view their standard video library. You can simultaneously select up to 15 check boxes.

**Note:** The system automatically selects the check boxes for *Personal Page* and *Team Page* for all videos you add to the library. Additionally, it automatically selects the *Default* option for the first video you add to the library.

- b. Specify which video will be automatically selected as default in participants' standard video library. Participants can change this default.
9. Click **Finish** when done to close the *Manage YouTube Videos* page and return to the *Image and Text Library* page.
10. Click **Save**.
11. [Update the event site](#).

## Specifiyng the URL for a YouTube Video

If you want participants to be able to link to YouTube videos from their personal or team pages, you must specify where the system can locate the video on the YouTube Web site. Each video must have a URL that points to its location. This is also true for YouTube videos to which participants link to from YouTube.

Specify the URL for a YouTube video when you add the video to the standard video library. If you need to change the URL for a YouTube video already added to the video library, you must first delete the video and then add it again to the library. If the video was already embedded in a participant's personal or team page, when the participant previews their personal or team page a message indicating the video is no longer available will be displayed in the embedded Flash player.

### ► Specify which YouTube videos participants can access from their personal or team pages

Use this procedure to select all YouTube videos you want participants to be able to access from their standard video library so that they can link to the video they set as default.

#### Prerequisites

- You have *Administrator (System)* functional access to the account or Virtual Account
- You have enabled the option that allows participants to link to YouTube videos in their personal or team pages
- You have added YouTube videos to the video library

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator. The <i>Kintera Tho</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Click **Manage videos**. The *Manage YouTube Videos* window opens.
4. For *Personal Page* and *Team Page*, select the **Video Library** check box for all videos to which you want participants to have access when they view their standard video library. You can simultaneously select up to 15 check boxes.

**Note:** The system automatically selects the check boxes for Personal Page and Team Page for all videos you add to the library. Additionally, it automatically selects the Default option for the first video you add to the library.

5. Specify which video will be automatically selected as default in participants' standard video library. Participants can change this default.
6. Click **Finish** to close the *Manage YouTube Videos* page and return to the *Image and Text Library* page.
7. Click **Save**.

## Editing a Thon YouTube Video

If you need to modify a video in the library, such as change its name, you must delete the video and then add it again to the library. If the video you want to change is the default video, you must first make another video the default.

If a participant's personal or team page was already linked to the video you changed, they will receive a message indicating that the video is no longer available the next time they access the standard video library or view their personal or team page.

### Edit a Thon YouTube video

If after you add a video to the library you want to change its name or URL, you must delete the video and then add it again. You cannot change the video's name or URL after it is added to the library. Additionally, if there is only one video in the library, it will be the *default* video and you cannot delete the default video. If necessary, add another video, set it to be the default, and then delete the other video.

## Testing a YouTube Video

After you add videos to the video library, test to make sure the videos work properly before publishing the Thon event site on the Internet. You can test the video by:

- Previewing it in the personal or team page after you add the video to the standard video library
- Logging into your personal headquarters, link to a video in a personal or team page, and then preview the video in the embedded Flash player

Other tests you should perform include:

- Linking to a YouTube video in a personal or team page to make sure participants will be able to do the same
- Deleting a video from the standard video library

### ► Test a YouTube video for an event site

Use this procedure to verify that a YouTube video works properly in a Thon event site before you publish the site on the Internet.

#### Prerequisites

- YouTube video is enabled for the Thon event site
- Participants can link to YouTube videos in their personal or team pages
- You have specified which YouTube videos participants can access from their personal or team pages
- You have added YouTube videos to the video library
- You have set the default YouTube video for participants' standard video library
- You have *Administrator (System)* functional access to the account or Virtual Account
- The Thon event site is already created
- If you plan to test a YouTube video from an event site, you are registered as an event participant

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator. The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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#### Test a YouTube video from the video library

1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens
2. Click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Click **Manage videos**. The *Manage YouTube Videos* page opens.
4. For *Click image to view Video in default player*, click the video you want. A window opens, showing the video in the player.
5. Click the *play* button in the player to play the video.

**Note:** If the video you want to test (preview) is no longer available on YouTube, you will receive a message when you attempt to play the video. The same is true if YouTube does not allow a video to be embedded in a Web page. You will receive a message informing you to watch the video from the YouTube Web site.

#### Test a YouTube video from a Thon event site

1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. For *Actions*, verify that **Preview** is selected.
3. Click **Update Your Event Now**.
4. In the pop-up window, confirm that you want to update the event. The page refreshes.
5. Click **Go**.
6. In the pop-up window, confirm that you want to test the event. The event site opens in a browser window.



7. For *My HQ* in the side bar, click **Enter my HQ** and log into your personal headquarters. The personal headquarters page opens.
8. Select the **My Webpage** tab.
9. Verify that the default YouTube video is displayed in the personal page. The video will automatically play in the embedded player when you click it in the player.

## Deleting a YouTube Video from the Video Library

If you no longer want to include a YouTube video in the library, you can delete (remove) it. This prevents participants from being able to link to the videos from their personal or team pages. You can also keep the video in the library, but not make it available for participants to select.

**Note:** The system will not allow you to delete the default video if it is the only video in the library. If you need to delete a specific video, you must first make another video the default.

If you want a YouTube video to remain in the video library but not allow participants to access it, remove its *Personal Page* and/or *Team Page* check box from the library. When participants access the standard video library, they will not see the video. You can always select the check box later when you want to make the video available. See the table below to understand what happens when you delete a YouTube video from the library:

If...	And...	Then...
You delete a video from the library	The video is the default video	<p>The system displays a message that you cannot delete the default video.</p> <p>The system will not allow you to delete the default video.</p>
You delete a video from the library	The video is not the default video	<p>The system asks you to confirm that you want to delete the video.</p> <p>If you confirm the delete, the video will be removed from the standard video library.</p> <p>If participants' personal or team page was linked to the video you deleted, they will receive a message indicating that the video is no longer available when they view their personal or team page.</p>

When you delete a YouTube video from the library, the link to the video is permanently removed from the database and cannot be recovered. If a participant's standard video library was open when you delete a video they were allowed to access, participants will see a message the next time they access the standard video library or refresh their browser window.

**Note:** You cannot delete YouTube video links that participants add to their video library, unless you log into their personal or team page using their login credentials.

### When Participants Delete a Video

Participants can only delete video links they add to their video library. They cannot delete videos you add to the video library. When a participant deletes a video from their video library, they will be prompted to confirm the delete and then the system will display the standard video library. If a video they deleted was already embedded in a personal or team page, participants (and their Web site visitors) will receive a message that the video is no longer available when they view the personal or team page.

#### ► Delete a YouTube video from the video library

Use this procedure to remove (delete) a YouTube video from the video library. When you delete a video from the library, the link to the video is removed from the database. You can always add the video to library later, if necessary.

**Note:** You cannot delete the default video. If you need to delete a video tagged as default, you must first make another video the default.

#### Prerequisites

- YouTube videos are already added to the video library
- You have *Administrator (System)* functional access to the account or Virtual Account

<b>Starting point:</b>	You are logged into the account or Virtual Account as administrator.  The <i>Kintera Thon</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Website Info**. The *Webinfo Checklist* page opens.
2. Under *Event Customization*, click **Image and Text Library for Page Customization**. The *Image and Text Library* page opens.
3. Click **Manage videos**. The *Manage YouTube Videos* window opens.
4. Make sure the video you want to delete is not the default video. If it is, select another video as default.
5. Click **Delete** for the video you want to remove.
6. In the pop-up window, confirm that you want to delete the video. The page refreshes.
7. Verify that the video is removed from the video list.
8. Click **Finish** to close the *Manage YouTube Videos* page and return to the *Image and Text Library* page.
9. Click **Save**.

# Manage event records with Bookkeeping

Use the table below to determine what you want to do.

What do you want to create/do?	What you will accomplish	What you need to set up
<a href="#">Access Bookkeeping for a Thon event</a>	Access the Bookkeeping feature for an event site	The event site must exist
<b>Manage Initiative Records</b>		
<a href="#">View login information for a supporter</a>	View the user name for an event supporter	Manage Initiative Records in event Bookkeeping
<a href="#">Send login information to a supporter</a>	Send user name information and a link to change the password to an event supporter	Manage Initiative Records in event Bookkeeping
<a href="#">Change a supporter's event role</a>	Use Bookkeeping to change the role of an event supporter	Manage Initiative Records in event Bookkeeping
<a href="#">Change a participant's fundraising goal</a>	Change the fundraising goal of an event participant	Manage Initiative Records in event Bookkeeping
<a href="#">Move a participant from one event to another</a>	Move a participant from one Thon event to another	Manage Initiative Records in event Bookkeeping
<a href="#">Move a donation to a different supporter</a>	Give credit to another donor by moving a supporter's donation to another supporter	Manage Initiative Records in event Bookkeeping
<a href="#">Change credits and debits</a>	Change the credit and debit information for an event participant	Manage Initiative Records in event Bookkeeping
<a href="#">Reverse a transaction (full and partial reversal)</a>	Reverse a transaction (for example, gift, payment, or order such as purchase and registration)	Manage Initiative Records in event Bookkeeping
<a href="#">Change a volunteer's event position</a>	Change a volunteer's position for an event	Manage Initiative Records in event Bookkeeping

<a href="#">Update the Honor Roll scroll</a>	Update the information that appears in a donor's Honor Roll scroll	Manage Initiative Records in event Bookkeeping
<a href="#">Update event fields</a>	Update event field information for a participant, the same event field for several participants, or different event fields for multiple participant	Manage Initiative Records in event Bookkeeping
<a href="#">Change the donation credit for an eCommerce purchase</a>	Change the donation credit and an eCommerce purchase made from a Thon event site	Manage Initiative Records in event Bookkeeping
<a href="#">Update the status of an eCommerce purchase</a>	Update the status of an eCommerce purchase made from an event site	Manage Initiative Records in event Bookkeeping
<b>Manage Pending Transactions</b>		
<a href="#">Confirm pending donations</a>	Confirm pending donations participants enter in the database from their personal headquarters	Pending Donations in event Bookkeeping
<a href="#">Confirm pending scheduled payments</a>	Confirm recurring donations made via a Thon event site	Pending Scheduled Payments in event Bookkeeping
<a href="#">Stop a recurring payment</a>	Delete future scheduled payments made via a Thon event site	Pending Scheduled Payments in event Bookkeeping
<a href="#">Confirm pending matching gifts</a>	Confirm pending matching gifts entered into the database	Pending Matching Gifts in event Bookkeeping
<a href="#">Confirm pending team requests</a>	Approve a team request from an event participant	Pending Team Request in event Bookkeeping
<a href="#">Confirm pending sponsorships</a>	Confirm pending sponsorship transactions	Pending Sponsorships in event Bookkeeping
<b>Manage Batch Transactions</b>		
<a href="#">Enter transactions as a batch using Key Entry</a>	Enter registrations, gifts, or sponsorship information for event participants using a Key Entry batch	Batch Entry System in event Bookkeeping
<a href="#">Enter transactions as a batch using CSV Import Batch</a>	Enter registrations, gifts, or sponsorship information for event participants using a CSV batch	Batch Entry System in event Bookkeeping
<a href="#">Apply automatic charges (Auto-Charge)</a>	Enable the system to automatically charge event participants' credit cards if the participants do not meet	Batch Auto-Charge Tool in event Bookkeeping

	required minimum fundraising goals	
<a href="#">Review failed auto charge payments</a>	Review the status of Auto-Charge payments	Review Failed Auto-Charge Payments in event Bookkeeping
<b>Manage Single Transactions</b>		
<a href="#">Enter a single donation for an event participant</a>	Enter a gift for a new or existing donor	Gift Entry in event Bookkeeping
<a href="#">Register a participant</a>	Register a participant for an event	Registration Entry in event Bookkeeping
<a href="#">Enter a sponsor</a>	Enter an event sponsor in the database	Single Sponsorship Entry in event Bookkeeping
<a href="#">Enter a purchase</a>	Enter a purchase for an event participant	Single Ecommerce Entry in event Bookkeeping
<a href="#">Enter a participant in an Opportunity Drawing</a>	Enter an event participant in an Opportunity Drawing	Single Opportunity Draw Entry in event Bookkeeping
<a href="#">Register a volunteer</a>	Register a volunteer for an event	Volunteer Registration Entry in event Bookkeeping

### ► Access Bookkeeping for a Thon event

Use this procedure to access Bookkeeping for a Thon event.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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- Highlight the event's name and then select **Bookkeeping**.

**Note:** After accessing Bookkeeping for a Thon event, you can manage a supporter's initiative records, pending transactions, batch transactions, and single transactions.

### ► View login information for a supporter using event Bookkeeping

Use this procedure to view login information for a Thon event supporter.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Participants** option is selected.
4. Search for the supporter, or click **Show All** to display all supporters of the Thon event.
5. Click **Edit** for the supporter whose user name and password information you want to view. The *Edit Participant* page opens.
6. Under *Edit Record – General Information*, view the supporter's *Username* information.

**Note:** Send login information to a supporter by clicking *Send Reset Password now*. When you send login information, Sphere sends an E-mail to the supporter that contains the login name and a link to change the password. The supporter can click the link in the E-mail to change the password, and then log into the event Web site using the new information.

#### ► Send login information to a supporter using event Bookkeeping

Use this procedure to send login information to an event supporter. A supporter may have provided this information when registering for the event, and may later request it to log into their personal headquarters. When you send login information, Sphere sends an E-mail to the supporter that contains the login name and a link to change the password. The supporter can click the link in the E-mail to change the password, and then log into the event Web site using the new information.

#### Prerequisites

- The Thon event site is [created](#)
- The supporter's user name and password information is already in the database

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Participants** option is selected.
4. Search for the supporter, or click **Show All** to display all supporters of the Thon event.
5. Click *Edit* for the supporter whose user name and password information you want to send. The *Edit Participant* page opens.
6. Under *Edit Record – General Information*, click **Send Reset Password now**. A page opens, informing you that the login information was sent. The supporter will receive an E-mail message that contains the login

name and a link to change the password.

### ► Change a supporter's event role using event Bookkeeping

Use this procedure to change a supporter's event role. For example, if during event registration a supporter signed up to assume the role of Team Member and would now prefer to assume the role of Team Co-Captain, you can assign the supporter to the new role.

**Note:** If a supporter is changing from Team Captain to another role, make sure that another team member has assumed the role of Team Captain before making the change.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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- Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
- For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
- For *Show Me*, verify that the **Participants** option is selected.
- Search for the supporter, or click **Show All** to display all supporters of the Thon event.
- Click **Edit** for the supporter whose role you want to change. the *Edit Participant* page opens.
- Select the **Edit Registration Information** tab.  
The field labeled *Current Role* shows the supporter's current role. The roles were created when the company or pyramid structure was set up, and the supporter was assigned to a role when registering for the event. Below the field is a list of available roles a supporter can assume.
- Click the desired role (for example, Join a Team).  
Depending on your selection, you will need to perform additional steps.
- After you make your selection, the *Current Role* field shows the supporter's new role.
- Click **Save**.
- In the pop up window, confirm that you want to make the change. A page opens, informing you that the registration has been updated.

### ► Change a participant's fundraising goal using event Bookkeeping

Use this procedure to change a participant's fundraising goal.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Participants** option is selected.
4. Search for the participant, or click **Show All** to display all participants of the Thon event.
5. Click **Edit** for the participant whose fundraising goal you want to change. The *Edit Participant* page opens.
6. Select the **Edit Registration Information** tab.
7. For *Fundraising Goal*, enter the new goal amount.
8. Click **Save**.
9. In the pop up window, confirm that you want to make the change. A page opens, informing you that the registration has been updated.
10. Click **Continue** editing the same record.
11. Verify the new goal amount in the *Fundraising Goal* field.

► **Move a participant from one event to another using event Bookkeeping**

Use this procedure to move a participant from one Thon event to another.

**Note:** If you plan to move a participant who has the role of Team Captain to another event, you must first make another participant the Team Captain.

**Prerequisites**

- The Thon event to which you are moving the participant is already [created](#)
- The participant exists in the database

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Participants** option is selected.
4. Search for the participant, or click **Show All** to display all participants of the Thon event.
5. Click **Edit** for the participant you want to move to another event. The *Edit Participant* page opens.
6. Select the **Edit Event Information** tab.
7. Under *Move Participant to Another Event*, click the link **Click to Move Participant**.

The *Move Participant to New Event* page opens, and shows a list of events. The events to which you can move the participant will contain a radio button. If it does not, this is because the new event does not have the same Web site status as the event from which you are moving the participant (for example, the current event is active and the other event is not active).



8. Click the radio button for the desired event, and then click **Next**.
9. For *Registration Type*, if the event has other registration types and you want to select a different registration type for the participant, select it from the list. Otherwise, leave the default selection of **No Change in Reg Type** to move the participant to the new event without changing the original registration type.
10. Select the **Email Registration Confirmation** check box if you want the participant to receive a notification E-mail, notifying the participant of the move.
11. Click **Finish**.
12. Click **Close**. The participant will receive an E-mail message. The *Subject* line of the message will contain the name of the event to which the participant has been moved.

### ► Move a donation to a different supporter using event Bookkeeping

Use this procedure to move a supporter's donation to another supporter using event Bookkeeping. By doing this, you will give credit to another donor.

#### Prerequisites

- The Thon event site is already [created](#)
- The donors already exist in the database

**Starting point:** You are logged into Sphere.  
The *Special Events: Kintera Thon Events* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, click **Donors**.
4. Search for the donor, or click **Show All** to display all donors for the event.
5. Click **Edit** for the donor whose gift you will move to another supporter. The *Edit Donor* page opens, and the *General Information* tab is in focus.
6. Under *Edit Record – Donation Credit*, click the appropriate option.
7. In the window that appears, click the option for the participant, team, or other event to which the donation will be moved. The name of the new participant, team, or event will be displayed next to the option you choose.
8. Click **Save**.

### ► Change credits and debits for a participant using event Bookkeeping

Use this procedure to change credit and debit information for an event participant.

#### Prerequisites

- The Thon event site is already [created](#)
- Credits and debits are already set up

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. For *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Participants** option is selected.
4. Search for the participant, or click **Show All** to display all participants of the Thon event.
5. Click **Edit** for the participant for whom you want to change credits or debits. The *Edit Participant* page opens, and the *General Information* tab is in focus.
6. In the *Miscellaneous Credits* and *Current Balance* fields, take note of the values displayed in those fields. You will need to verify this information later when you change the participant's credit or debit. If these fields do not appear on the screen, this means that a credit or debit was not initially applied to the participant's record.
7. Select the **Apply/Edit Credits & Debits** tab, and then perform the following steps if you want to apply a credit or debit:
  - a. Click **Add**, and then select the debit or credit in the *Choose From* field.
  - b. Click **Save**. A window opens, informing you that the credit or debit was updated.
8. Click **Close Window and refresh 'Edit Participant Information'**.
9. If necessary, click **Retry** in the pop up window.
10. Verify that the new credit or debit is added to the *Apply/Edit Credits and Debits* list.
11. Select the **General Information** tab.
12. Verify that the credit or debit is accurately reflected in *Miscellaneous Credits* and *Current Balance*.

#### ► Reverse a transaction using event Bookkeeping

Use this procedure to reverse a transaction (for example, gift, payment, or order such as purchase and registration). You can perform a full or partial reversal.

You may need to perform a full reversal if, for example, a participant can no longer attend your event or a donation was made in error. A full reversal removes the participant or donor from the event but not from the database.

You may need to perform a partial reversal if, for example, a participant made a donation during event registration and would like to change the donation amount. A partial reversal does not remove the participant from the event.

**Note:** The Chargeback feature in Sphere is for organizations that have their own payment processor. The card holder's bank must reverse the transaction. Instructions for performing a chargeback are not included in this procedure or other sections in the online Help.

#### Prerequisites

- The Thon event site is already [created](#)
- Transactions are already entered in the database

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. If you are deleting a registration, for *Show Me* verify that the **Participants** option is selected. If you are deleting a donation, select the **Donors** option.
4. Search for the participant or donor, or click **Show All** to display all participants of the Thon event.
5. Click **Edit** for the participant or donor for whom you want to reverse the transaction. The *Edit Participant* or *Edit Donor* page opens.
6. Select the **Delete Record from Initiative** tab.
7. Perform a full or partial reversal as described below.

#### To perform a full reversal and delete the participant's record from the event

1. Click **Delete record from event and reverse transaction**.
2. Click **Reversal** to trigger a refund of the transaction

**Note:** Once you reverse a transaction, you cannot undo the reversal.

3. For *Reasons*, select one of the following options:
 

Click **Customer Dispute** if the reason for the refund is because the participant believes, and can prove, that the charge is not valid.

Click **Duplicate Payment** to refund a payment if it was duplicated.

Click **Correction** to refund a payment to correct an error made when the payment was entered into the database.

Click **Other** if none of the above selections adequately clarify the reason for the refund.
4. For *Description*, enter detailed information describing the reason for the refund, up to 250 alphanumeric characters. As you write the description, the system will count the number of characters you have entered, and will show this number below the text box.
5. Click **Submit**.
6. In the pop up window, confirm that you want to reverse the transaction for the reason you specified. A page opens that notifies you the transaction was reversed.

**Note:** When you reverse a transaction, the participant's record will be deleted for the event, and the participant's name will be removed from the Manage Initiative Records page. If the participant you are deleting is a group or company leader in the event pyramid structure, team participants associated with the individual become independent.

7. Click **Back to 'Edit Records'**.
8. Click **Show All**.
9. Verify that the participant's name is removed from the participants list in the *Manage Initiative Records* page.

#### To perform a partial reversal for a registration or donation

1. Click **Reverse partial transaction only**.
2. Select one of the following options:  
If you want to reverse a registration fee, select the **Registration Type & Fee** check box.  
If you want to reverse a donation, select the **Additional Donation** check box.
3. For *Reversal Amount*, enter the dollar amount that will be reversed.
4. Click **Submit**.
5. In the pop up window, confirm that you want to reverse the transaction. A page opens, notifying you that the transaction was reversed.
6. Click **Back to 'Edit Records'**.
7. Click **Show All**.
8. Verify that the proper reversal amount was applied for the participant. It will appear within parentheses next to the payment type.

#### To perform a partial reversal for a purchase

1. In the *Delete Record from Initiative* tab, enter the reversal amount and any processing fee.
2. Click **Update Totals**.
3. For *Description*, enter a detailed description explaining the reason for the reversal.
4. Click **Submit Reversal**. A page opens that notifies you the transaction was reversed.
5. Click **Back to 'Edit Records'**.
6. For *Show Me*, click **Ecommerce**.
7. Click **Show All**.
8. Verify that the proper reversal amount was applied for the participant. It will appear within parentheses next to the payment type.

#### ► Change a volunteer's event position using event Bookkeeping

Use this procedure to change a volunteer's event position.

##### Prerequisites

- The Thon event site is already [created](#) and you are registering volunteers through your Thon

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, verify that the **Volunteer** option is selected.
4. Search for the volunteer, or click **Show All** to display all volunteers of the Thon event.
5. Click **Edit** for the volunteer whose event position you want to change. The *Edit Volunteer* page opens, and the *General Information* tab is in focus.
6. Select the **Edit Volunteer Information** tab.
7. Select the check box for the new volunteer position to which you will assign the volunteer. You can select more than one position if necessary.
8. Select the **Email confirmation receipt to volunteer** check box if you want to notify the volunteer of the change.
9. Click **Save**.
10. In the pop up window, confirm that you want to make the change.

#### ► Update Honor Roll scroll information using event Bookkeeping

Use this procedure to update the information that appears in a donor's Honor Roll scroll.

#### Prerequisites

- The Thon event site is already [created](#)
- The donor exists in the database

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, click **Donors**.
4. Search for the donor, or click **Show All** to display all donors of the Thon event.
5. Click **Edit** for the donor whose Honor Roll scroll information want to change. The *Edit Donor* page opens, and the *General Information* tab is in focus.
6. Under *Edit Record – Dedication Information*, make the necessary changes.
7. Click **Save**.
8. In the pop up window, confirm that you want to make the change.

#### ► Update event fields using event Bookkeeping

Use this procedure to update event field information for a participant or donor, update the same event field for multiple participants or donors, and update different event fields for multiple participants or donors.

You can update event fields only if the participant or donor completed the fields when completing the form for the event. If the participant or donor did not select or enter information in the event field, they will not be displayed in the *Edit Event Information* tab.

### Prerequisites

- The Thon event site is already [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. Update event fields as described below.

### To update a single participant's event field information

1. For *Show Me*, verify that the **Participants** or **Donors** option is selected depending on the type of record for which you are searching.
2. Search for the record, or click **Show All** to display all participants or donors in the event.
3. Click **Edit** for the participant whose event field you want to update. The *Edit* page for the record opens, and the *General Information* tab is in focus.
4. Select the **Edit Event Information** tab. The event fields you can change appear under *Edit Event Fields*.
5. Update the desired fields.
6. Click **Save**.
7. In the pop up window, confirm that you want to update the fields. A page opens, informing you that the change was made. You can either continue to modify the same record, or return to the *Manage Initiative Records* page.
8. Click the appropriate link.

### To update the same event fields for multiple participants or donors

1. For *Show Me*, verify that the **Participants** or **Donors** option is selected depending on the type of record for which you are searching.
2. Search for the record, or click **Show All** to display all participants or donors in the event.
3. Select the check boxes for the contact records you want to update.
4. Click **Batch Update**. The *Batch Update* page opens.
5. Select one of the following options:
 

Click **Update Selected Records** if you only want to update the contact records you selected in step 1.

Click **Update All Query Records** to update all records that are based on a query or search result.

**Note:** *Event Fields* is automatically selected for *The tool will allow you to update*.

6. Click **Continue**. A page opens to show the custom event fields that were enabled (set to Active) on the form (for example, *How did you hear about us?*), and which you can change.
7. Make the appropriate changes. If the data field is a text field, text area, date, number, radio button, or selection list the update will overwrite any existing data for the participants. If the data field is a check box or multiple selection field, the update will add the values you select and will not overwrite existing selections.
8. Click **Save**.
9. In the pop up window, confirm that you want to update the fields. The event fields for the selected contacts will be updated. You can view the changes by viewing the *Edit Event Information* tab for each participant as described in *To update a single participant's event field* information above

### To update different event fields for multiple participants or donors

Updating different event fields for multiple participants or donors requires that you use a .csv file, which must include a column for Payment ID and must have a Payment ID for each row in the file. The Payment ID allows the system to know which event fields you are updating and to whom the fields belong for the event. You can create the .csv file using an application such as Microsoft Excel.

1. For *Show Me*, click **Participants, Donor, Volunteer, Ecommerce, Auction, or Opportunity Draw**.
2. Search for the contact record, or click **Show All** to display all records for the event.
3. Click **Choose Columns**.
4. In the pop up window, confirm that you want to update the fields. A window opens, displaying the columns available for display in the *Manage Initiative Records* list.
5. Select the check box for **Payment ID**, and then click **Save**.
6. Verify that the *Payment ID* column is added to the list.
7. Export the list as a Microsoft Excel file as follows:
  - a. Click **Export XLS**.
  - b. In the export file window that opens, click **Get File Here**.
  - c. In the pop up window, click **Save** and select where to save the file. Be sure to give the file a name you can easily recognize, and make sure it is saved with file extension .xls.
  - d. Close the **Download complete** pop up window when done.
  - e. Close the export file window.
  - f. Open the export file and save it with file extension .csv.
8. Update the records in the export file to contain the event fields you want for each record by performing the following steps:
  - a. In the *Manage Initiative Records* page, click **.CSV Batch Import. The CSV Batch Import page opens**.
  - b. Click **New**. A 3-step wizard page opens, starting with *Step 1 of 3: Select the Fields for the Batch*.
  - c. For *Name of Batch*, enter a name for the CSV batch you are about to create.
  - d. In the *Available Fields List*, click the event field you want.

**Note:** You can select more than one field at a time by pressing the Ctrl key on the keyboard while clicking the desired fields.

- e. Click **Add** to copy the field to *Fields For Batch*.
- f. If you want to rearrange the order the fields will be displayed, select the field in *Fields For Batch* and then click **Top**, **Up**, **Down**, or **Bottom**.

**Note:** *Payment ID* is a required field. Do not remove it from *Fields For Batch*.

- g. Click **Next** to display the *Step 2 of 3* wizard page.
- h. Select the check box. Most likely, the .csv file contains a header row with field titles. Checking this box will enable the import tool to ignore the first row of information in the file.
- i. Browse for the .csv file you created.
- j. Click **Next** to display the *Step 3 of 3* wizard page.
- k. Map the fields in the .csv file to fields in Sphere. For example, for *Payment ID* select *PaymentID* from the drop-down list box. Do this for all event fields you want to map to Sphere fields.
- l. Click **Import Now**. A page opens *that shows the batch you have just created, and its status (for example, Waiting to be processed or Processed)*. Refresh your browser window to update the page, if necessary.
- m. Highlight the name of the batch in the list, and then click **View Details** to view the details of the batch import process.
- n. Click **Manage Initiative Records** in the Breadcrumb.

**Note:** The event fields for the selected contacts will be updated. You can view the changes by viewing the *Edit Event Information* tab for each record as described in *To update a single participant's event field information* above.

### ► Change the donation credit for an eCommerce purchase using event Bookkeeping

Use this procedure to change the donation credit for an eCommerce purchase made from a Thon event site.

#### Prerequisites

- The Thon event site is already [created](#)
- A purchase is entered in the database

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, click **Ecommerce**.
4. Search for the registrant, or click **Show All** to display all registrants of the event.
5. Click **Edit** for the registrant whose purchase status you want to update. The *Edit Participant* page opens,



and the *General Information* tab is in focus.

6. Click **Registrant Credited**.
7. Click **Change eCommerce Credit**. The *Edit Donor* page opens so that you can search for the registrant to which the credit will be provided.
8. Enter the *First Name* and *Last Name* information and then click **Search**. The name of the individual to which the credit will be applied is listed.
9. Click the name. The *General Information* tab opens.
10. Click **Save**.
11. In the pop up window, confirm that you want to make the change. A page opens that notifies you the credit information has been updated.
12. Click **Back to 'Edit Records'**.

### ► Update the status of an eCommerce purchase using event Bookkeeping

Use this procedure to update the status of an eCommerce purchase made from an event site, as well as to update shipping information.

#### Prerequisites

- The Thon event site is already [created](#)
- A purchase was made from a Thon event site

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
3. For *Show Me*, click **Ecommerce**.
4. Search for the participant, or click **Show All** to display all participants of the event.
5. Click **Edit** for the record you want to update. The *Edit Participant* page opens, and the *General Information* tab is in focus.
6. Select the **Shipping Information** tab.
7. For *Shipping Status*, select the appropriate status of the purchase.
8. Make any necessary changes to the remaining fields.
9. Click **Save Changes**.
10. In the pop up window, confirm that you want to update the shipping information. A page opens that notifies you the shipping information has been updated.
11. Click **Back to 'Edit Records'**.

### ► Confirm pending donations using event Bookkeeping

Use this procedure to confirm pending donations participants enter in the database from their personal headquarters. Donations entered via a participant's headquarters are flagged as pending until they are confirmed (received) in the database. After confirmation, you can view and manage the donations using event Bookkeeping.

#### Prerequisites

- The Thon event site is [created](#)
- Participants entered donations via their headquarters

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Pending Transactions*, click **Pending Donations**.
3. Confirm donations as described in the procedures below.

#### Confirm all donations for a participant

1. For *View By*, make sure the **Participants** option is selected.
2. Select the check box for all participants whose donations you want to confirm.
3. Click **Confirm**.
4. In the pop up window, confirm the action.
5. Verify that the selected participants' donations are removed from the list.
6. Click **Bookkeeping** in the Breadcrumb.
7. Click **Manage Initiative Records** under *Edit Transactions*.
8. For *Show Me*, click **Donors**.
9. Search for the donors, or click **Show All** to display all donors of the event.
10. Verify that the donations you confirmed are added to the list.

#### Confirm specific donations for a participant

1. For *View By*, click **All Entries**.
2. Select the check box for the specific donations you want to confirm.
3. Click **Confirm**.
4. In the pop up window, confirm the action.
5. Verify that the selected participant's donation is removed from the list.
6. Click **Bookkeeping** in the Breadcrumb.
7. Under *Edit Transactions*, click **Manage Initiative Records**.

8. For *Show Me*, click **Donors**.
9. Search for the donors, or click **Show All** to display all donors of the event.
10. Verify that the donations you confirmed are added to the list.

#### ► Confirm pending scheduled payments using event Bookkeeping

Use this procedure to confirm pending scheduled payments (recurring donations) made via a Thon event site. When a donor makes a contribution online using a credit card, ACH, or PayPal you must first change the payment type to Off-line or Cash before you can confirm the scheduled payment.

##### Prerequisites

- The Thon event site is [created](#)
- Donors made contributions via the event site

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Pending Transactions*, click **Pending Schedule Payments**. The *Pending Scheduled Payments* page opens.
3. For *View By*, click **All Scheduled**.
4. Click **Show All**.

**Note:** If you are paying off the scheduled payments with a different form of payment than the original transaction used, you will need to edit the payment type to cash or check. If you are paying off the scheduled payments earlier than scheduled with the same form of payment originally used, you will need to edit the payment dates of the scheduled payments.

5. Click **Detail** for the pending scheduled payment you want to confirm.  
A window appears, within which you can select the pending scheduled payment to confirm.
6. For *Payment Schedule*, if there is only one pending schedule payment waiting to be confirmed, go to the next step. Otherwise, click **Edit/Confirm** for the scheduled payment you want to confirm.
7. In the resulting window, change the payment type to cash or check, or change the payment date (as described in the Note above) and then click **Confirm**.
8. In the pop up window, confirm that you want to update the payment information.
9. Close the payment schedule window.
10. Verify that the pending scheduled payment is removed from the list

#### ► Stop a recurring payment using event Bookkeeping

Use this procedure to delete future scheduled (recurring) payments made via a Thon event site.

##### Prerequisites

- The Thon event site is [created](#)
- Donations have been made via an event site

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Pending Transactions*, click **Pending Scheduled Payments**. The Pending Scheduled Payments page opens.
3. For *View By*, click **All Scheduled**.
4. Click **Show All**.
5. Click **Detail** for the pending scheduled payment you want to delete. A window appears, within which you can select the pending scheduled payment to delete.
6. For *Payment Schedule*, click **Delete** for the specific scheduled payment you want to delete, or click **Delete All Future Payments** to delete all scheduled payments.

**Note:** If you delete all future payments, the scheduled payments are removed from the *Pending Scheduled Payments* list

7. In the pop up window, confirm that you want to delete the payment.
8. Close the payment schedule window.

### ► Confirm pending matching gifts using event Bookkeeping

Use this procedure to confirm pending matching gifts, which can be entered in the system when: a donor enters a matching gift via a Thon event site; you enter a matching gift as a pledge using Single Gift Entry in event Bookkeeping; or you enter a matching gift using Single Gift Entry in event Bookkeeping and then indicate on the donation form that the gift will be matched.

#### Prerequisites

- The Thon event site is [created](#)
- The donor's contribution included the matched gift amount

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Pending Transactions*, click **Pending Matching Gifts**. The *Pending Matching Gifts* page opens, and lists all matching gifts that were entered in the system.
3. Select the **Confirm** check box for the pending matching gift you want to confirm.

4. In the resulting window, complete all required fields.
5. Click **Confirm**.
6. Click **Close**. The *Pending Matching Gifts* page will refresh, and the pending matching gift will be removed from the list.

### ► Confirm pending team requests using event Bookkeeping

Use this procedure to approve a team request from an event participant. You must enable the Request a Team option when you set up the Thon event, and the option will be added to the participant registration form. When participants register for an event, a confirmation message will inform the participants that they will be notified regarding the status of the request.

#### Prerequisites

- The Thon event site is [created](#)
- You selected the *Users request to form teams* option when you created the Thon event

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Pending Transactions*, click **Pending Team Requests**. The *Pending Team Requests* page opens, and the list shows the name of the individual who requested the team.
3. Click the individual's last name. A window opens, showing the *Request a Team Information* form and the *Start a Team* option is selected to indicate that the individual originally requested to start a team.
4. Complete all required fields, and any additional fields you want on the form.

If the individual requesting the team provided a team name, this information will be populated in the *Team Name* field. Additionally, although the *Email Confirmation Text* field is not required, we recommend that you write a custom message that will be E-mailed to the individual requesting the team, notifying them as to whether the team was accepted or any reasons why it was declined.

5. To accept the team request, click **Accept Team**. Or click **Decline** to reject the request.

If you accepted the team request, the *Pending Team Request* page will open and the request you approved will be removed from the list.

If you declined the request, you do not need to complete the form. Clicking *Decline* will remove the request from the list. The requester will receive an E-mail notification that indicates the request was declined.

### ► Confirm pending sponsorships using event Bookkeeping

Use this procedure to confirm pending sponsorship transactions. This is only available if you enable this functionality in your Thon event site through *Website Info*—specifically, *Sponsorship Opportunities* in *Website Features*.

**Note:** Before you confirm the pending sponsorship, edit the sponsor's record and change the payment type to indicate how you received the sponsorship payment (for example, by Check, Cash, In-Kind, or Offline Credit

Card). By doing so, you will prevent the payment type from appearing as BILLME in Manage Initiative Records after you confirm the pending sponsorship.

### Prerequisites

The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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### Step 1: Change the payment type

1. Highlight the event's name and then select **Bookkeeping**.
2. Under *Pending Transactions*, click **Pending Sponsorships**. The *Pending Sponsorships* page opens, and shows a list of all pending sponsorships.
3. Highlight the sponsor's last name and then select **Edit Sponsorship**. The *Edit Sponsorship* page opens.
4. For *Payment Type*, click the appropriate payment type.
5. Make any additional changes you want.
6. Click **Save**.
7. Confirm the pending sponsorship as described below.

### Step 2: Confirm the pending sponsorship

1. In the *Pending Sponsorships* page, select the check box for the pending sponsorship you want to confirm.
2. Click **Confirm**.
3. In the pop up window, confirm the change. The *Pending Sponsorships* page appears the sponsorship is removed from the list.
4. Click **Bookkeeping** in the Breadcrumb.
5. Under *Edit Transactions*, click **Manage Initiative Records**. The *Manage Initiative Records* page opens.
6. For *Show Me*, click **Sponsors**.
7. Click **Show All**.
8. Verify that a new record has been added to the list for the sponsor.

### ► Enter transactions as a batch using Key Entry in event Bookkeeping

Use this procedure to enter registrations, gifts, or sponsorship information for event participants into the database using a key entry batch via Bookkeeping.

### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere. The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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**Step 1: Create a batch template**

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Batch Transactions*, click **Batch Entry System**. The *Batch Entry* page opens.
3. Click **New Batch Template**. A *Set up a template* page opens.
4. Complete *Step 1: Set up a template* as follows:
  - a. For *Template name*, enter a name for the batch template.
  - b. For *Type*, select the type of batch you are creating.
  - c. *Created* shows the current date and time information.
  - d. *Author* shows the name of the user currently logged into the account.
  - e. For *Description*, enter a brief description for the batch (for example, Registration Batch Template).
  - f. Click **Next**.
5. Complete *Step 2: Select the fields for the Batch* as follows:
  - a. In *Available Fields List*, select the fields you want to include in the batch template and then click **Add** to copy the field to *Fields for Batch*.
 

**Note:** You can select more than one field at a time by pressing the Ctrl key on the keyboard as you select each field. Include all fields you consider to be important and which will be included in the template. All fields in *Fields for Batch* that are shown within parentheses are required, and fields within brackets are custom fields. When you select Donations or Registration + Donations, you will have to add the necessary fields for these template types in the appropriate pages that appear.

**Note:** If the custom field you are looking for is not on the list of available fields you must activate it on the Sphere Entry form which you access via *Website Info* in *Customize Forms*.
  - b. Click **Next** when done.
6. Complete *Step 3: Set up Defaults for the Fields* as follows:
  - a. For each field you want to have a default value, enter their value.
  - b. Click **Finish** when done. The *Batch Entry* page appears, and shows the new batch in the list.
7. Create a *Key Entry* batch as described below.

**Step 2: Create a Key Entry batch**

1. In the *Batch Entry* page, highlight the template's name and then select **Batch Entry**.
2. Click **New Key Entry Batch**.  
 The *New/Uncommitted Batch Entry* page opens. To avoid entering duplicate information in the database, first search the database for the contact records. If you are entering transactions for existing contact records, search for the records so that you can link the new transaction to the records. You can also enter information manually in the batch.
3. For *Name of Batch*, enter a name for the batch or leave the default name.
4. Click the **Search** icon for each batch entry row to locate the contact record in the database that you will add to the batch, or enter the information directly in the row. For example, you may have an existing contact record for which you are entering gift data, or a contact record for which you are entering registration information; or you may be creating a new contact record.
5. Click **Save & Validate** to verify that you have entered the necessary information in each row for the type

of batch you are creating.

6. Click **Commit** when you are ready to create the batch. It is during the commit process that the data will be written to the database.
7. In the pop up window, confirm that you want to write the data to Sphere.

The *Process Batch Records* page opens to notify you that the batch is scheduled for processing. Depending on the amount of information and network status, this process may take a while to complete.

8. Click **Back to Manage Batch**.

The *Manage Batch: Event Bookkeeping Batch Template* page opens, and shows the status of the batch in the list. While the batch is waiting to be processed, the status will be *Waiting to be processed*. When it is processed, the status will be *Processed*.

9. If necessary, click **Update Batch Status** to update the *Status* column. Alternatively, you can refresh the browser window.

### Step 3: View batch status

1. After the batch completes, highlight the batch's name and select **Statistics**.
2. Verify that the total number of records entered in the batch was written to the database without errors.
3. Click **Send Email Confirmation** if you want to send E-mail confirmation to the contacts that are included in the batch, if their E-mail addresses were included in the batch.
4. Click **Bookkeeping** in the Breadcrumb.
5. Click **Manage Initiative Records** under *Edit Transactions*.
6. For *Show Me*, click the appropriate option to verify that the records were successfully entered into the database.

### ► Enter transactions as a batch using CSV Import Batch in event Bookkeeping

Use this procedure to enter registrations, gifts, or sponsorship information for event participants into the database using CSV Import Batch via Bookkeeping.

#### Prerequisites

The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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### Step 1: Create a batch template

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Batch Transactions*, click **Batch Entry System**. The *Batch Entry* page opens.
3. Click **New Batch Template**. A *Set up a template* page opens.
4. Complete *Step 1: Set up a template* as follows:
  - a. For *Template name*, enter a name for the batch template.
  - b. For *Type*, select the type of batch you are creating.



- c. *Created* shows the current date and time information.
  - d. *Author* shows the name of the user currently logged into the account.
  - e. For *Description*, enter a brief description for the batch (for example, Registration Batch Template).
  - f. Click **Next**.
5. Complete *Step 2: Select the fields for the Batch* as follows:

- a. In *Available Fields List*, select the fields you want to include in the batch template and then click **Add** to copy the field to *Fields for Batch*.

**Note:** You can select more than one field at a time by pressing the Ctrl key on the keyboard as you select each field. Include all fields you consider to be important and which will be included in the template. All fields in *Fields for Batch* that are shown within parentheses are required, and fields within brackets are custom fields. When you select *Donations* or *Registration + Donations*, you will have to add the necessary fields for these template types in the appropriate pages that appear.

**Note:** Do not include the *online\_credit\_cards* field in *Fields for Batch*. If you include this field, you will not be able to create a new CSV import batch.

**Note:** If the custom field you are looking for is not on the list of available fields you must activate it on the Sphere Entry form which you access via *Website Info* in *Customize Forms*.

- b. If you want to rearrange the order the fields will be displayed, select the field in the *Fields for Batch* and then click **Top**, **Up**, **Down**, or **Bottom**.
  - c. Click **Next**.
6. Complete *Step 3: Set up Defaults for the Fields* as follows:
- a. For each field you want to have a default value, enter their value.
  - b. Click **Finish** when done. The *Batch Entry* page appears, and shows the new batch in the list.
7. Create a CSV Import batch as described below.

## Step 2: Create a CSV Import batch

1. In the *Batch Entry* page, highlight the template's name and then select **Batch Entry**.
2. Click **New .CSV Import Batch**.  
The *Import CSV* page opens. The list box shows all of the fields you selected when you created the batch template.
3. Select the check box.  
Most likely, the .csv file contains a header row with field titles. Checking this box will enable the import tool to ignore the first row of information in the file.
4. Browse for the CSV file you created.
5. For *Options for Mapping fields*, make your selection as follows:
  - Select **No** if you want Sphere to automatically map the fields in your batch file with corresponding fields in Sphere.
  - Select **Yes** if you want to manually map the fields.
6. Click **Submit**.

7. If you selected *No* in step 5 above, go to step 8 below.

If you selected *Yes*, the *Map the fields* page opens within which you can map each field. Complete the page as follows:

- a. For each field in your CSV file, select the corresponding field in Sphere. For example, if you have a field named *Payment Date* map this field to Sphere's *Payment Date* field by selecting it from the drop-down list box. Do this for all fields in your CSV file that you want to map to fields in Sphere.
- b. For Options for *registration\_type*, make your selection as follows:
  - Choose the **Check if you want to map to registration\_type** option if you have a *Registration Type* field in your CSV file, and then select **Registration Type** from the drop-down list box.
  - Choose the **Check if you want to set default value** option if you have the *Registration Type* field in your CSV file, but the field does not contain any data. In the drop-down list box, select the value that will be the default. For the *Size* field, select any default values if this field is included in your CSV file.

8. Click **Import Now**

The *New/Uncommitted Batch Entry* page opens. To avoid entering duplicate information in the database, first search the database for the contact records. If you are entering transactions for existing contact records, search for the records so that you can link the new transaction to the records. You can also enter information manually in the batch.

9. Click the **Search** icon for each batch entry row to locate the contact record in the database that you will add to the batch, or enter the information directly in the row. For example, you may have an existing contact record for which you are entering gift data, or a contact record for which you are entering registration information; or you may be creating a new contact record.
10. Click **Save & Validate** to verify that you have entered the necessary information in each row for the type of batch you are creating.
11. Click **Commit** when you are ready to create the batch. It is during the commit process that the data will be written to the database.
12. In the pop up window, confirm that you want to write the data to Sphere.

The *Process Batch Records* page opens to notify you that the batch is scheduled for processing. Depending on the amount of information and network status, this process may take a while to complete.

13. Click **Back to Manage Batch**.

The *Manage Batch: Event Bookkeeping Batch Template* page opens, and shows the status of the batch in the list. While the batch is waiting to be processed, the status will be *Waiting to be processed*. When it is processed, the status will be *Processed*.

14. If necessary, click **Update Batch Status** to update the *Status* column. Alternatively, you can refresh the browser window.

### Step 3: View batch status

1. After the batch completes, highlight the batch's name and select **Statistics**.
2. Verify that the total number of records entered in the batch was written to the database without errors.
3. Click **Send Email Confirmation** if you want to send E-mail confirmation to the contacts that are included in the batch, if their E-mail addresses were included in the batch.
4. Click **Bookkeeping** in the Breadcrumb.

5. Click **Manage Initiative Records** under *Edit Transactions*.
6. For *Show Me*, click the appropriate option to verify that the records were successfully entered into the database.

#### ► Apply automatic charges using event Bookkeeping

Use this procedure to enable the system to automatically charge (Auto-Charge) event participants' credit cards, if the participants do not meet required minimum fundraising goals. When Auto-Charge is enabled, you have the option to review the status of failed payments.

#### Prerequisites

- The Thon event site is [created](#)
- Registration types must be created
- The check box for *Collect credit card information for offline registrations* must be enabled for the registration types

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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#### Step 1: Create a query for participants whose credit cards will be automatically charged

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Batch Transactions*, click **Batch Auto-Charge Tool**. The *Batch Auto-Charge Tool* page opens.
3. Click **New**.
4. In the *New Auto-Charge Batch* page, perform the following steps:
  - a. Under *Auto-Charge Configuration*, select the check box for the registration type to be included in the Auto-Charge list. Select as many check boxes as necessary.
  - b. Under *Criteria for Calculation*, select the appropriate check box to determine the criteria that will be used to calculate which participants' credit cards will be automatically charged. Select as many check boxes as necessary.

The *Total Confirmed Raised* check box is automatically selected, and you can not change this setting. The *Calculation* field shows the formula that will be used to determine who will be automatically charged.
5. Click **Run Query**.

The *Qualifying Participants* page opens to show all participants that meet the Auto-Charge criteria. If the list is empty, it is because no participants in your database matched your specified criteria. You may need to narrow your query.

**Note:** The *Auto-Charge* column displays YES for all participants whose credit cards will be automatically charged. You can disable Auto-Charge for one or more participants by selecting the participants' check box and clicking **Do Not Auto-Charge**. After you confirm not to auto-charge participants, their status in the *Auto-Charge* column changes to NO.

6. Apply the Auto-Charge as described in the procedures below.

**Step 2: Apply automatic charges**

**Note:** All participants with a YES status in the Auto-Charge column will be automatically charged.

1. Click **Auto-Charge Participants**.
2. In the pop up window, confirm that you want to apply the Auto-Charge.

A page opens to show that an Auto-Charge batch is scheduled to be processed. While the batch is waiting to complete, the status will be *Scheduled*. When it is processed, the status will change to *Complete*.

► **Review failed Auto-Charge payments using event Bookkeeping**

Use this procedure to review the status of auto charge payments.

**Prerequisites**

- The Thon event site is already [created](#)
- Automatic charges have been applied

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Batch Transactions*, click **Review Failed Auto-Charge Payments**. The *Review Failed Autocharge Payments* page opens, and the list shows all Auto-Charge payments that failed to process.
3. Click **Detail** for a participant. A window opens that shows more information regarding the transaction. An Auto-Charge may fail for a number of reasons including the credit card may have expired or was closed, or the donor may have over extended their credit limit. Resolve these issues and then re-initiate the Auto-Charge.

► **Enter a single donation for an event participant using event Bookkeeping**

Use this procedure to enter a gift for a new or existing donor using event Bookkeeping.

**Prerequisites**

The Thon event site is [created](#)

<b>Starting point:</b>	You are logged into Sphere.  The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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**Enter a gift for a new donor**

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Gift Entry**. The *Single Donation Entry* page opens.
3. Under *Search For Donor*, click **New**.
4. Under *Search for Participant, Team or Group*, search for the participant, team or company to whom the

gift will be credited for the event.

5. Click the option for the individual. If the gift is a general donation to the event, then click **None** instead of searching for a participant, team, or company. The donation form opens.
6. Complete the donation form as follows:
  - a. Click **Individual donor** or **Organization donor**.
  - b. Click the appropriate option to indicate whether you are entering a one-time contribution or recurring donation.
  - c. Complete all required fields on the form.
  - d. Click **Submit**. A *Dedication* page appears. Complete it as follows:
    - i. For *Recognition From*, select the appropriate option to indicate how the donor would like to be recognized for the contribution. If you select *Other*, you must provide the information.
    - ii. For *Recognition Type*, select the appropriate option to indicate the type of recognition.
    - iii. For *Recognition To*, enter the name of the individual being recognized.
    - iv. Select the check box if the donor would like their donation amount to be displayed in the Honor Roll scroll on the event site.
    - v. Click **Preview** to preview the Honor Roll scroll.
    - vi. Click **Submit** when you are satisfied with your selections.

A confirmation page opens to indicate that the gift was entered in the database. The donor will receive a notification E-mail (if a valid E-mail address was entered in the Email field).
7. Click **Bookkeeping** in the Breadcrumb.
8. Click **Manage Initiative Records** under *Edit Transactions*.
9. For *Show Me*, click **Donors**.
10. Search for the donor or click **Show All** to display all donors of the Thon event.
11. Verify that the donor's name is included in the list.

#### Enter a gift for an existing donor or participant

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Gift Entry**. The *Single Donation Entry* page opens.
3. Under *Search for Donor*, search for the existing donor.
4. Click the option for the donor.
5. Under *Search for Participant, Team or Group*, search for the participant, team or company to whom the gift will be credited for the event.
6. Click the option for the individual. If the gift is a general donation to the event, then click **None** instead of searching for a participant, team, or company. The donation form appears.
7. Complete the form as described in *Enter a gift for a new donor* above, starting with step 6a.

#### ► Register a participant using event Bookkeeping

Use this procedure to register a participant for an event using Bookkeeping.

#### Prerequisites

- The Thon event site is [created](#)

**Starting point:** You are logged into Sphere.  
The *Special Events: Kintera Thon Events* page is displayed. If not, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Registration Entry**. The *Single Registration Entry* page opens.
3. Under *Search for Registrant*, search the database to see if the individual is already a contact to avoid creating a duplicate contact. If the individual is not in the database, click **New**.
4. If the appropriate record is listed in the search results, click the option for the registrant.
5. Make the appropriate selection for the type of registration you want.
6. Complete all required fields.
7. Complete the registration form.
8. Click **Submit**. A *Dedication* page appears only if an *Amount* was entered under the *Donation* heading during the registration process. The page will be completed as described in the steps below. If a donation amount was not entered, this page will not appear and you can complete it as follows:
  - a. For *Recognition From*, select the appropriate option to indicate how the participant would like to be recognized for their own personal contribution. If you select *Other*, you must provide the necessary information.
  - b. For *Recognition Type*, select the appropriate option to indicate the type of recognition.
  - c. For *Recognition To*, enter the name of the individual being recognized.
  - d. Select the check box if the registrant would like their donation amount to be displayed in the Honor Roll scroll on the event site.
  - e. Click **Preview** to see how the information will appear in the Honor Roll scroll.
  - f. Click **Submit** when you are satisfied with your selections. A confirmation page opens to indicate that the registration was successfully entered. The registrant will receive a notification E-mail (if a valid E-mail address was entered in the Email field).
9. Click **Bookkeeping** in the Breadcrumb.
10. Click **Manage Initiative Records** under *Edit Transactions*.
11. For *Show Me*, click **Participants**.
12. Search for the participant or click **Show All** to display all participants of the Thon event.
13. Verify that the registrant's name is included in the list.

### ► Enter a sponsor using event Bookkeeping

Use this procedure to enter an event sponsor using Bookkeeping.

#### Prerequisites

- The Thon event site is [created](#)

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Single Sponsorship Entry**. The *Single Sponsorship Entry* page opens.
3. Under *Search for Sponsor*, search the database to see if the sponsor (for example, company) is already a contact to avoid creating a duplicate contact. If the sponsor is not in the database, click **New**.
4. If the appropriate record is listed in the search results, click the option for the sponsorship.

The sponsor form opens. Complete it as follows:

- a. Click **Individual Sponsor** or **Organization Sponsor**.
- b. Complete all required fields on the form including the following information listed under *Sponsorship Level Information*.
  - Sponsorship Level
  - Sponsor Logo
  - Sponsor Website Address
  - Amount
- c. Click **Submit**.

A confirmation page appears to indicate that the sponsor was entered in the database. The sponsor will receive a notification E-mail (if a valid E-mail address was entered in the *Email* field).

5. If you want to add another sponsor, click **Enter Another Sponsor**. Otherwise, click **Go To Main Bookkeeping** to return to the Bookkeeping page.
6. Click **Manage Initiative Records** under *Edit Transactions*.
7. For *Show Me*, click **Sponsors**.
8. Search for the sponsor, or click **Show All** to display all sponsors of the Thon event.
9. Verify that the sponsor's name is included in the list.

#### ► Enter a purchase using event Bookkeeping

Use this procedure to enter a purchase for an event participant using event Bookkeeping.

#### Prerequisites

- The Thon event site is [created](#)
- The electronic store must already be set up

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Single Ecommerce Entry**. The *Ecommerce Entry* page opens.
3. Under *Search for Buyer*, click **New**.
4. If the appropriate record is listed in the search results, click the option for the buyer.
5. Select the product category.
6. Select the product.
7. Click **Add to Cart** to add the product to the shopping cart.
8. Complete the *Shopping Cart* page.
9. Click **Proceed to Checkout** when done.
10. Complete required fields, and any other fields you want, in the *Billing* form.
11. Click **Submit**.
12. Complete required fields, and any other fields in the *Shipping Information* form.
13. Click **Submit**.
14. Verify that the information in the *Billing Information* page is accurate.
15. Click **Submit**. A confirmation page appears to indicate that the purchase was entered in the database. The buyer will receive a notification E-mail.
16. If you want to make another purchase, click **Make Another Ecommerce Entry**. Otherwise, click **Bookkeeping** in the Breadcrumb.
17. Click **Manage Initiative Records** under *Edit Transactions*.
18. For *Show Me*, click **Ecommerce**.
19. Search for the buyer, or click **Show All** to display all buyers of the Thon event.
20. Verify that the buyer's name is included in the list.

#### Enter a purchase for an existing buyer

1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Single Ecommerce Entry**. The *Ecommerce Entry* page opens.
3. Under *Search for Buyer*, search the database to see if the buyer is already a contact to avoid creating a duplicate contact.
4. If the appropriate record is listed in the search results, click the option for the buyer.
5. Complete the purchase as described in *Enter a purchase for a new buyer* above, starting with step 5.

**Note:** When you reach step 10, all fields in the form that were previously completed for the buyer will automatically be populated with existing information.

#### ► Enter a participant in an Opportunity Drawing using event Bookkeeping

Use this procedure to enter an event participant in an Opportunity Drawing using Bookkeeping.

#### Prerequisites



- The Thon event site is [created](#)
- The Opportunity Drawing is already created

<b>Starting point:</b>	<p>You are logged into Sphere.</p> <p>The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b>.</p>
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Single Opportunity Draw Entry**. The *Opportunity Draw Entry* page opens.
3. Under *Search for Registrant*, search the database to see if the registrant is already a contact to avoid creating a duplicate record. If the registrant is not in the database, click **New**.
4. Complete the *Drawing Packages* page to purchase Opportunity Drawing tickets.
5. Click **Next**.
6. Complete all required fields, and any other fields you want in the *Billing* form.
7. Click **Submit**.
8. Verify that the information in the *Billing Information* page is accurate.
9. Click **Submit**.  
A page appears to show the numbers assigned to each Opportunity Drawing tickets purchased.
10. Click **Continue**.  
A confirmation page appears to indicate that the Opportunity Drawing purchase was successfully completed. The buyer will receive a notification E-mail.
11. If you want to purchase additional Opportunity Drawing tickets, click **Make Another Opportunity Drawing Entry**. Otherwise, click **Bookkeeping** in the Breadcrumb.
12. Click **Manage Initiative Records** under *Edit Transactions*.
13. For *Show Me*, click **Opportunity Draw**.
14. Search for the registrant, or click **Show All** to display all registrants of the Thon event.

#### ► Register a volunteer for an event using event Bookkeeping

Use this procedure to register a volunteer for an event using Bookkeeping.

##### Prerequisites

- The Thon event site is [created](#)
- Volunteer registration is enabled
- Volunteer positions are created

<b>Starting</b>	You are logged into Sphere.
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<b>point:</b>	The <i>Special Events: Kintera Thon Events</i> page is displayed. If not, select <b>Communities &gt; Special Events &gt; Friends Asking Friends &gt; Kintera Thon</b> .
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1. Highlight the event's name and then select **Bookkeeping**. The *Bookkeeping* page opens.
2. Under *Add Single Transactions*, click **Volunteer Registration Entry**. The *Single Volunteer Entry* page opens.
3. Under *Search for Registrant*, the database to see if the registrant is already a contact to avoid creating a duplicate record. If the registrant is not in the database, click **New**.
4. Select the check box for the volunteer position.
5. Click **Submit**.
6. Complete all required fields, and any other fields you want, in the volunteer registration form.
7. Click **Continue**. A confirmation page appears to indicate that the volunteer registration process was successful. The volunteer will receive a notification E-mail.
8. If you want to register another volunteer, click **New Volunteer Registration**. Otherwise, click **Bookkeeping** in the Breadcrumb.
9. Click **Manage Initiative Records** under *Edit Transactions*.
10. For *Show Me*, click **Volunteers**.
11. Search for the volunteer, or click **Show All** to display all volunteers of the Thon event.
12. Verify that the volunteer's name is included in the list.

# Event Management Overview

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## Event Groups

Sphere administrators can define event groups for similar events that occur across multiple accounts. A Web site template format and pyramid structure can then be inherited across all initiatives associated with the event group. Any organization at any level can generate an event group; however, event groups generated from higher levels of the organizations propagate to all lower level organizations.

**Note:** Although event groups are used primarily for larger organizations with events across the nation, your smaller event would need to have an event group set up if you wish to use the pyramid recruitment feature.

Event groups are used to link together multiple events. For example, if an organization has a national walk event that local offices throughout the country organize, the event group allows these events to be linked together. The event group set up only has to be completed once. Each account in the organization is automatically given the ability to assign the event groups to any of their new initiatives.

## Event Group Features provide

- Event data linkage – after an event group has been set-up, any new development initiative can be assigned to that event group and its data therefore linked to other initiatives in the group for reporting.
- Pyramid structure – each event group can be assigned a unique event pyramid structure that will be inherited by all events created in that group. The pyramid structure includes at least three levels: top level, team and walker. Additional levels can be added for more complex structures between the top level and the team level. Each level can be given custom names to match the specific event. Only events set up as Thon can be set up with a pyramid structure.
- Event central Web page – Sphere automatically generates an event central Web page for each event group. This Web page lists all of the individual initiatives and features a search engine to facilitate larger events so that users can quickly find the event in their area.
- Event Web site templates – event groups can be used to pre-define attributes such as event modules, images, text and colors. This feature provides uniformity in design and function across larger events within the event group.

- **Team Groups** - allows Multi-Tier accounts to create "National Corporate Sponsor Pages". This allows for a way to group several "teams" in a pyramid structure for roll up data. For example, this feature should be used when there is a company that participates nationwide in your walk. When each local "group" is created for an event, you can associate to the appropriate team group to create a national roll up of how that company did nationwide.

**Note:** Only events set up with the Pyramid Structure can use Team Groups.

All users can see the option **Manage Event Groups** in Administration Headquarters and view events in a particular event group. But only users within the top level of a multi-tier account or a single-tier level can create an event group.

Event groups are created in this section. The actual linking of an event to an event group occurs in the **New Initiative** section within the **Development** section.

### Event Group Terms

- **Properties** - Highlights the group name, initiative type and group event central web site address.
- **Hosted Events** - Displays the specific initiatives associated with this event group. Initiatives are associated when they are set up in **Development** by related accounts within the organization's account structure.
- **Pyramid Structure** - Displays the recruitment pyramid structure.
- **Group Template** - Creates an event Web site template allowing you to control and assign default parameters for your child event Web sites. You can also set permissions to limit access to alter features at the child level.
- **Team Group** - Creates a way to group together several "teams" in the pyramid structure for roll up data. For example, this feature should be used when there is a company that participates nationwide in your walk. When each local "group" is created for an event, you can associate to the appropriate team group to create a national roll up of how that company did nationwide.

### ► Create an event group

Use this procedure to create an event group and then add events to group, create committee, and manage an event group including creating an event group template.

1. Select **Control Administration > Organization Setup > Manage Event Group**.
2. Click **Action**.
3. Click **New Event Group**.
4. For *Name*, enter the event group's name.
5. For *Type*, select the event (initiative) type.
6. Click **Submit**.

You will return to the main event group page. The new group will be displayed in alphabetical order.

### To set up a pyramid structure for an event group

**Note:** You cannot create a pyramid structure if there are hosted events already linked to the group.

1. Select **Control > Administration > Organization Setup > Manage Event Group**.
2. Select the event group and click **Action**.
3. Select **New Pyramid Structure**. The Pyramid Structure always starts out with two default levels: *Team* and *Participants*.
4. To add levels above the default tiers, enter the new level name and click **Add**.  
The new level will post in the box. Enter as many levels as you need to create your pyramid structure.
5. Use **Up** and **Down** to move the levels.
6. To delete a level, highlight it and click **Delete**.
7. When finished, click **Submit**.

#### To create an event template for an event group

1. From the Control menu, select **Control > Administration > Organization Setup > Manage Event Group**.
2. Select the event group and click **Action**.
3. Click the option under Action that says New Group Template.
4. Enter the template's name.
5. Click **Submit**.
6. The template will now appear within your Development Headquarters as a new event Web site. You can use the Event Permissions to set up the template and lock down certain design parameters for child events.

#### To view group event details

1. In the Event Group page, expand the event group list.
2. Select the event group for which you want to see more information.

#### To set up team groups within an event group

**Note:** Team groups can only be created if there is a pyramid structure already set up for the event group. Team groups are created in this section. The actual linking of team to a team group occurs in the Manage Pyramid Recruitment section within the Development section.

1. Select **Control > Administration > Organization Setup > Manage Event Group**.
2. Click the event group name.
3. Click **Action**.
4. Click the option under Action that says Add/Edit Team Groups.
5. Enter the Team Group names. Use **Up** and **Down** to order them for the associated drop down box used in the Development section.
6. Click **Submit**.

#### ► Create an event template

Use this procedure to create a *Friends Asking Friends* template for an event group. The template is an event in which you define attributes such as images, text, and colors for other events to use. Typically, you create templates in national or parent accounts and then associate events in child or local accounts with them. For

example, if your organization hosts walks in multiple cities, you create a template event in the national account and then associate the local events with the template when you create them in their child accounts. Template events help your organization save time and create consistency between events.

To create a template, create an event group and then add a group template. Next, configure the template and specify whether associated events can modify each of the sections. After you activate the template, it appears as an option in the *Event Group* field for new events. Select the template when you create each of the local events so they inherit the configuration.

### Prerequisites

- None

<b>Starting point:</b>	You are logged into Sphere.
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### Step 1: Create an event group

1. Select **Control > Administration > Organization Setup > Manage Event Group**.
2. In the *Manage Event Groups* page, select **Event Groups** and then click **Action**.

**Note:** For the *Action* button to be available, your account must not be a child account.

3. Select **New Event Group**.
4. In the *New Initiative Group* pop-up window, perform the following steps:
  - a. For *Name*, enter a name for the event group.
  - b. For *Type*, select **Kintera Thon**.
  - c. Click **Submit**.
  - d. Verify that the new event group is added to the *Event Groups* list.
  - e. Create a template as described below.

### Step 2: Create a template

1. In the *Manage Event Groups* page, select the event group and then click **Action**.
2. Select **New Group Template**.
3. In the resulting pop-up window, perform the following steps:
  - a. For *Name*, enter the template's name. The program automatically appends the word *template* to the end of the event group name.

**Note:** The program updates the event group name to the name you enter for the template. If you also use the company pyramid feature, use a name that is appropriate to appear for both the template and the company structure.

- b. To enable another template tier for middle level accounts within your organization to use, select **Enable 2nd tier template option**. The option enables middle accounts to receive changes from the master template, modify them, and then push their updates to lower accounts.
- c. Click **Submit**. The template appears for the event group on the *Manage Event Groups* page. The template name also appears in the *Friends Asking Friends* list with a yellow icon to indicate it is a

template event.

- d. Configure the template event as described below.

### Step 3: Configure the template event

Event configuration for template events is the same as other events, except when you configure templates you specify whether to allow modifications.

1. Select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. In the *Friends Asking Friends* list, highlight the name of the event template and select **Website Info**. The *Event Website Creation Checklist* page appears.
3. Complete the steps to [create a thon event](#). In each section:
  - Clear the **Allow child events to modify this section** checkbox to disable the section in associated events.
  - Click **Save** to save your changes to the template.
  - Click **Save and Update Child Events** to save your changes to the template and update associated events. In the window that appears, select whether to update all associated events with the changes or only events that include modifications to the area.

**Note:** Use the **Save and Update Child Events** option after you activate the event and associate other events with it.

4. Select **Template Active** to activate the template and make it available for other events to use.

### Step 4: Associate an event with the template

1. Select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. In the *Special Events: Kintera Thon Events* page, click **New**.
3. In the *Complete Initiative Information* page, perform the following steps:
  - a. For *Name*, enter the event's name, for example *Walk for Peace* (up to 140 characters).

**Note:** The event's name will be seen by all visitors of the Web site. Make sure it is clear, correctly spelled, and grammatically correct. As a best practice, include date-specific information in the title of the Thon event (for example, *Walk for Peace 2008*), especially if you have or will have multiple Thon events in the future.

- b. For *Fund*, select the appropriate fund or the Sphere Default Fund.
- c. For *Event Group*, select the event group that includes the template.
- d. Click **Submit**.
- e. In the confirmation page that appears, verify your information and then click **Finish**.  
The *Special Events: Kintera Thon Events* page is displayed, and the new event site appears in the list. The new event includes the configuration from the template.
- f. Update the template as necessary. For information about modifying template events, see [Modifying Event Templates](#).

## Modifying Event Templates

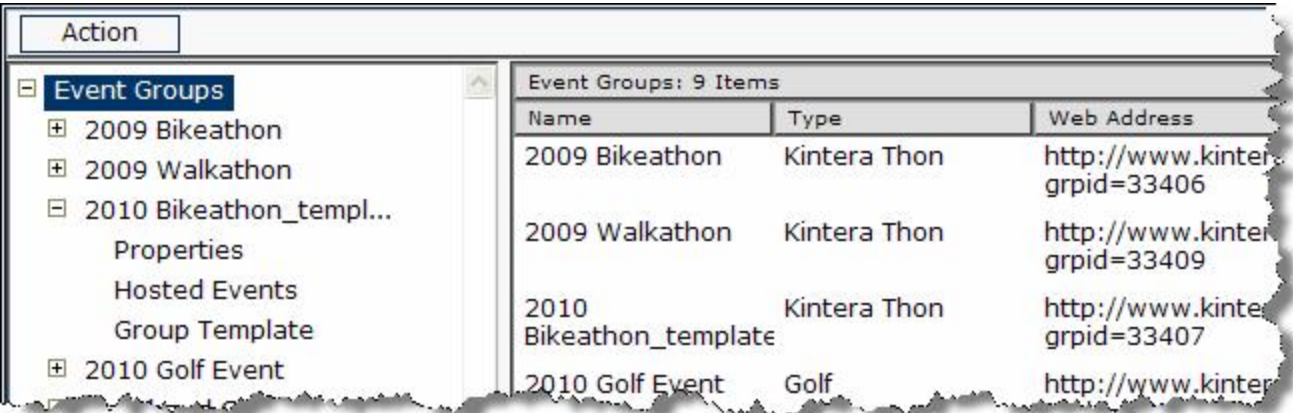
When you modify event templates, Sphere provides several options for you to save the changes and publish them to associated events.

Click	To
<b>Save</b> in the area you modify	Save changes only to the template. Use this option if events are not yet associated with the template, or you want to add an update but not yet share the changes with associated events.
<b>Save and Update Child Events</b> in the area you modify	Save changes to the template and update associated events. After you select this option, you specify whether to update all child events with the changes or only events that include modifications to the area. Note: It is not necessary to select <b>Publish ALL Events Now</b> in the <i>Event Website Creation Checklist</i> when you use this option.
<b>Publish This Event Now</b> in the <i>Event Website Creation Checklist</i>	Publish changes you save in the template to the template.
<b>Publish ALL Events Now</b> in the <i>Event Website Creation Checklist</i>	Publish changes that are saved but unpublished in associated active events.

# Company Pyramid Structure Overview

Organizations have a hierarchical structure (similar to a pyramid), whereby at the highest peak (level) is the organization and beneath it are other levels and sublevels. Sphere enables you to mimic your organization's pyramid structure so that you can better manage your event teams. This company pyramid structure is especially useful when you need to collect specific team information in reports.

To access or create a company pyramid structure, you must have functional access to *Manage Event Groups* and the account into which you are logged must not be a child account. If you are logged into a child account, you will not see the Action button (see figure below) that enables you to create a company pyramid structure.



You can select and use the *Action* button when you select Event Groups from the tree structure or when you select a specific event group. The table describes the actions you can perform with each selection:

When you select...	You can...
--------------------	------------



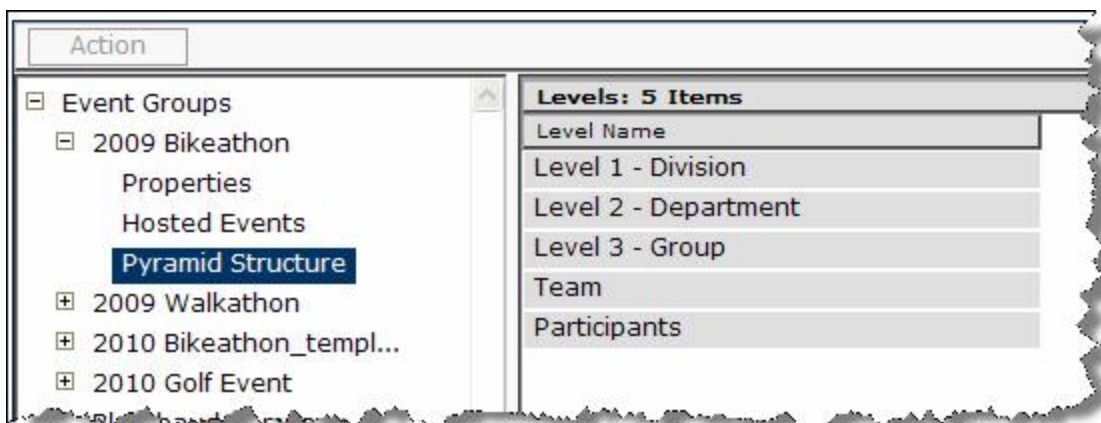
Event Groups	Add a new event group. Make sure the name is spelled correctly, as you cannot change it after creating the event group.
An event group (company under <i>Event Groups</i> )	<p>Create an event group for a specific event type, and then within it create a pyramid structure for how you want teams within the company to be structured. You can only create one pyramid structure for an event group. If a pyramid structure is already created, you will not have the option to create a new one.</p> <p>Add or modify team groups for an existing event group.</p> <p>Convert an event group to a template.</p> <p>Delete an event group.</p>

**Note:** If you can see but cannot select the *Action* button, you may need to refresh your browser. Otherwise, it may be because you have selected *Properties*, *Hosted Events*, *Pyramid Structure*, or *Team Group* for an event group.

## Creating a Company Pyramid Structure

The event structure you create in a pyramid structure is called an *event group*. Create an event group for an event type, and within the event group create a pyramid structure for how you want teams within the company to be structured. Notice the four event groups in the left pane of the figure below (2009 Bikeathon, 2009 Walkathon, 2010 Bikeathon\_template, and 2010 Golf Event).

You may want to create an event group template if this is a multi-tier account and you want child accounts to use the template.



You can create as many event groups per initiative type as needed to reflect your organization's structure, and they appear in the following areas in Sphere:

- In the *Event Groups* list when you create a new event (initiative).
- In *People* report pages for *Registrant* when you choose to limit the report to a specific event group (available via *Control > Reports > People*).
- In report results when you view the event group report. The event group's name appears in the *Initiative Group Name* column if you created the people report via *Control > Reports*; it appears under *Initiative Group* if you selected the *Initiative Group* check box for the data to display when you run the people report via *Control > Report Center*; and it appears in quick reports for an event when you select *Reports* for the event and then select the *Initiative Group* check box.

You can also select the event group when you manage the company pyramid to add leaders to event and team group levels.

### Event Group Levels in a Company Pyramid

Event group levels enable you to determine how to structure the organization when setting up event teams. When you create a company pyramid in an event group, you must give the event group a name and associate it with an event type (for example, Thon). Then, define the levels of the company pyramid (see the figure below for an example of where you define the different event group levels. Level 1 could be a division within the organization. Level 2 could be a department within that division, and Level 3 could be a group (for example, Sales) within the department. Create as many event group levels as you need to accurately reflect the different group levels within the organization.

Add and edit levels to the recruit pyramid structure.

New Level:  **Add**

Level	Name
1	Level 1 - Division
2	Level 2 - Department
3	Level 3 - Group

**Up** **Down** **Delete**

Default levels in the lower part of the recruit pyramid structure:

4	Team
5	Participants

**Submit** **Cancel**

At the lowest level of a company pyramid structure (for example, Level 3 in the above figure), the system automatically adds the *Team* and *Participants* levels. In the figure, *Team* becomes Level 4 and *Participants* becomes Level 5. Each time you add a new level, the *Team* and *Participants* levels are automatically updated.

### Team Groups in a Company Pyramid

Team groups in a company pyramid structure enable you to more effectively manage your event teams. Create as many team groups as needed (see example figure below) for an event group to accurately reflect the event team structure for your organization.

Group	Name
1	Go Getters Team
2	Enthusiastic Team
3	Catch Up Team

Create team groups at the event group level in *Manage Event Groups*. When you create a team group for an event group, it appears in the *New Team* window when you manage the company pyramid structure using *Event Admin* for the specific event.

### ► Set up a company or pyramid structure in a Thon event site

Use this procedure to create a hierarchical structure for registration. Setting up a company/pyramid structure enables you to create groups that contain teams. For example, you can create a group named *Company ABC*, and within that group create teams such as *Product Management*, *Human Resources*, *IT Department*, and so on.

**Prerequisites**

- None

<b>Starting point:</b>	You are logged into Sphere.
------------------------	-----------------------------

**Step 1: Create an event group**

1. Select **Control > Administration > Organization Setup > Manage Event Group**.
2. In the *Manage Event Groups* page, select **Event Groups** and then click **Action**.

**Note:** For the Action button to be available, your account must not be a child account.

3. Select **New Event Group**.
4. In the *New Initiative Group* pop-up window, perform the following steps:
  - a. For *Name*, enter a name for the event group.
  - b. For *Type*, select **Kintera Thon**.
  - c. Click **Submit**.
  - d. Verify that the new event group is added to the *Event Groups* list.
  - e. Create a pyramid/company structure as described below.

**Step 2: Create a pyramid/company structure**

1. In the *Manage Event Groups* page, select the event group and then click **Action**.
2. Select **New Pyramid Structure**.
3. In the resulting pop-up window, perform the following steps:
  - a. For *New Level*, enter the level's name (for example, Company) and then click **Add**.
  - b. Add as many pyramid levels as you need.

**Note:** Use **Up** or **Down** to rearrange the order the levels appear in the list. Also, the bottom part of the window shows the default levels created automatically.

- c. Click **Submit**. The Manage Event Groups page shows the pyramid/company structure you have created.
4. Create team groups as described below.

**Step 3: Create team groups**

1. In the *Manage Event Groups* page, select the event and then click **Action**.
2. Select **Add/Edit Team Groups**.
3. In the *New Team Group* pop-up window, perform the following steps:
  - a. For *New Team Group*, enter the name of the team group and then click **Add** (for example, Eastern Division).
  - b. Add as many team groups as you need.

**Note:** If you want to delete a group, select it and then click **Delete**. If you want to modify the information you enter for a group, click where you want to make changes, and then make the change.

4. Click **Submit**.
5. Create a Thon event as described below.

#### Step 4: Create a Thon event site and associate it with the event group

**Note:** When you set up the *Complete Initiative Information* page when creating the Thon event site, after selecting the Fund be sure to select the event group in the Event Group field to associate the site with the event group. This is a very important step in creating a company pyramid/structure.

1. Perform Steps 1 and 2 in [Create a basic Thon event site](#).
2. When done, create a committee as described below.

#### Step 5: Create a committee

1. Select **Communities > Special Events > Friends Asking Friends > Kintera Thon**.
2. Highlight the event's name and then select **Event Admin**. The *Event Admin* page appears.
3. For *Event Planning*, click **Setup and Manage Event Committees**.
4. In the *All Committees* page, click **New Committee**.
5. In the *New Committee* pop-up window, perform the following steps:
  - a. For *Committee Name*, enter a name for the committee. If you do not have a committee, enter a generic name such as *General Committee*.
  - b. Select the **Executive Committee** check box if you want to differentiate between multiple committees. Check this box only if this committee is the Executive.
  - c. Click **Submit**.
6. Verify that the new committee is added to the *All Committees* page.
7. Click the radio button for new committee and then click **Show Roles**.
8. In the *Roles* page, click **New Role**.
9. Select the check box to choose roles for the committee members and then click **Submit**.

**Note:** If the role you want to assign is not in the list, click **New Role** to create one.

10. Verify that the new role is added to the *Roles* page.
11. Add members to roles by creating committee members as described below.

#### Step 6: Create a committee member

1. In the *Roles* page, click the radio button for the role and then click **Show Members**.

**Note:** If the *Roles* page is not currently displayed, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**. Highlight the event's name and click **Event Admin**. In the *Event Admin* page, click **Setup and Manage Event Committees**. In the *All Committees* page, click the radio button for the committee name, and then click **Show Roles**.

2. In the *Members* page, click **New Member**.
3. In the *All Individuals Contacts* window, click **New Member** or search for an existing individual to add to the committee.
4. In the *New Committee Member* page, complete the required fields to add the committee member to the database and to assign the member a committee role.
5. Click **Submit**.
6. Verify that the member is added to the *Members* list.
7. Enter data into the pyramid/company structure as described below.

#### Step 7: Enter data into the pyramid/company structure

1. Click **Event Admin** in the [Breadcrumb](#).
2. In the *Event Admin* page for the event, click **Manage Company Pyramid** listed under *Recruitment*.

**Note:** If the *Event Admin* page is not currently displayed, select **Communities > Special Events > Friends Asking Friends > Kintera Thon**. Then, highlight the event's name and click **Event Admin**.

3. In the *Company Pyramid* page, highlight **New** and then select the first pyramid/company structure you created.
4. In the resulting page, click **New**.
5. Complete all required fields in the company/pyramid page as follows:
  - a. For *Name to appear on website*, enter the name you want site visitors to see when they visit the event site. For example, if a company is the top level of your pyramid you would add the company's name.
  - b. For *Owner*, select the committee member you created in step 6. The owner does not appear on the Web site.
  - c. Click **Company** to open the *Search Company* page so that you can search for the company, or create it.

**Note:** When you select the company, its name and *Supporter ID* will be added to the appropriate fields.

- d. In *Leader Information*, complete the required fields for the team's leader. This information will appear on the Web site's group page. For *Company*, you will be prompted to select an existing company from the database or create a new one to associate as the company's leader.
- e. Select the **Would you like to send this individual a registration email...** check box if you want to send a registration confirmation E-mail to the group leader. You will need to enter the recipient's E-mail address. Use this option to prevent duplicate company leader registrations. The E-mail information you provide here is important. If the group leader forgets this information in the future, you can resend it.
- f. Select the **Would you like to set up a team for this leader?** check box if you want to set up a team that will be organized under the team leader. Use this option to associate multiple roles for the company leader with one Supporter ID.

**Note:** If you select any of these options, a confirmation E-mail will be sent to the new company leader and it will include a username and password for the company leader to use to access their

Headquarters (HQ) page. If, in the future, the company leader forgets this username and password information, you can always access and resend it.

- g. Click **Submit**.

The new company/level appears in the pyramid. Click the company level and details for the company pyramid will be displayed in the right pane of the page. Click the right arrow next to the last name (for example, Leader) to view the username and password information sent to the leader. If you need to resend this information later, this is where to acquire it.

- h. Close the window.
- i. Enable teams as described below.

### Step 8: Enable teams

1. Click **Kintera Thon** in the Breadcrumb.
2. Highlight the event's name, and select **Website Info**.
3. In the *Event Website Creation Checklist* page, click **Website Features** under *Event Customization*.
4. In the *Website Features* page, make the following selections:
  - a. Select the check box for **Event Teams**.
  - b. Click any of the **Users...** options for *Event Teams*.
  - c. Select the **Show the ranking of top teams** check box to show the *Group Rank* and *Team Rank* boxes on the event site.
  - d. Click **Save**.
5. Click *Webinfo Checklist* in the Breadcrumb.
6. Verify that *Website Features* includes a check mark.
7. Update and preview the site as described below, and then launch the site when you are ready to make it available on the Internet.

### Step 9: Update and preview the Thon event site

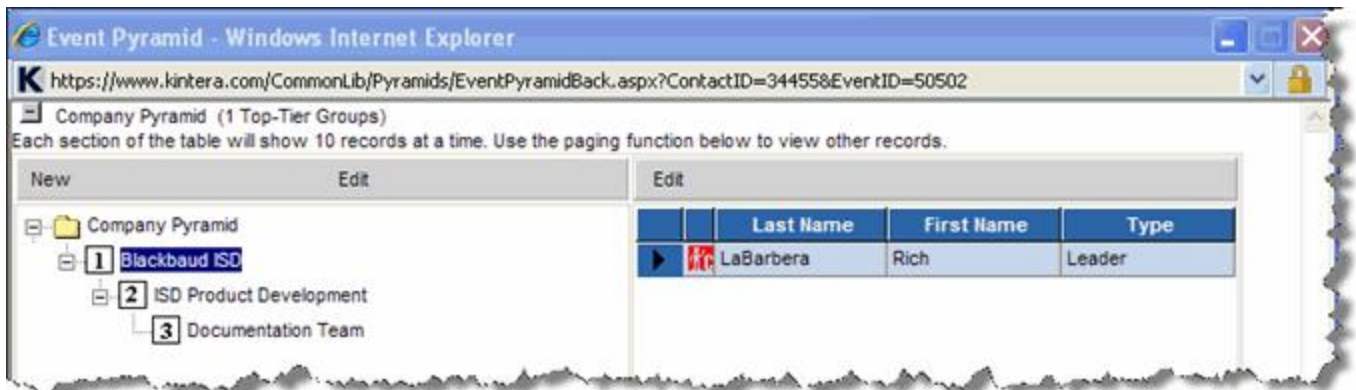
1. In the *Event Website Creation Checklist* page, click **Preview** for *Actions*.
2. Click **Update Your Event Now**.
3. Confirm that you want to update the event.
4. For *Web address*, click **Go**.
5. Confirm that you want to preview the event page. The event page opens, showing the *Group Rank* and *Team Rank* boxes to indicate that you have successfully set up the pyramid structure.

**Note:** After you successfully set up the company pyramid, group leaders can administer it via their headquarters by clicking **Manage Company Pyramid** on the *Tools* tab. The *Manage Company Pyramid* link will not be added to the *Tools* tab for teams who are below the group leader's team level.

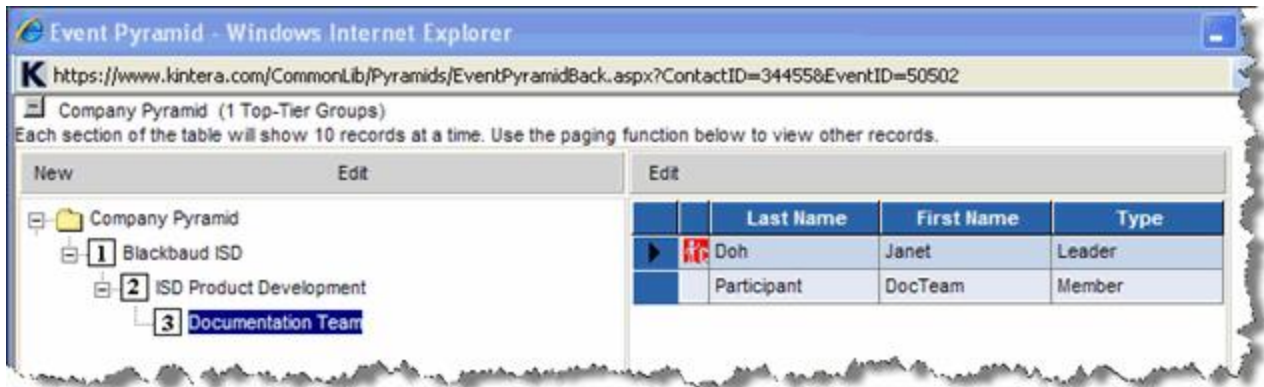
## Event and Team Group Leaders

Each event group or team group must have a leader (captain). Create leaders by managing the company pyramid for the specific event using *Event Admin*. Create leaders for the following:

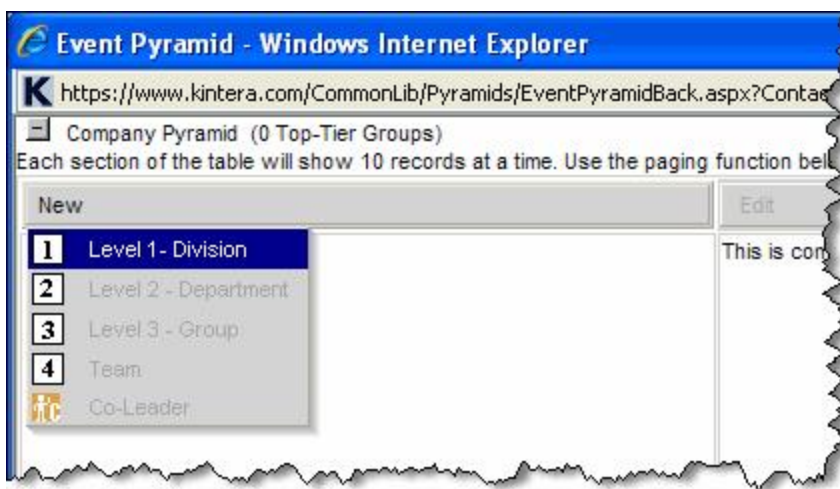
- *Event groups* (Level 1 or Level 2).



- *Teams at the team group level* (Level 3)



The event group and team group levels must already exist in the database when you create team leaders. To add a leader to an event or team group, first select it and then move the mouse pointer to New to select the group level (see figure below). The levels that appear in the list are the different levels created for the event group in the company pyramid structure.



After you select a group to which you will assign team leaders, in the *Add Leader* window that opens you can either search for the person that will become the team leader or create a new one.



## Creating Team Leaders

Create a team leader for each event group level in the company pyramid structure. For Level 1 groups, you can specify the owner, company, team group, and team leader.

\* Owner: Rich LaBarbera

\* Company: Blackbaud

Supporter ID: 120415919      Alternate ID:

Team Group: Documentation Team

ISD Division Leader Information

\* First Name: Beatrice      \* Last Name:

In order to select an owner for Level 1 groups, you must first set up a committee, create committee roles, and then assign committee members to roles. Once this is done, you can select the owner from the Owner field in the above figure. To select a company, the organization's record must already exist in the database or you can create a new record during the team leader creation process. To select a team group, the team group level must already exist for the event group's company pyramid structure.

## Team Members and Company Pyramids

When a participant starts a team for an event via the event's Web site, the participant will become the team captain (see figure below). When a participant joins an existing team, the participant becomes a team member. In the example figure below, notice that two people registered for an event. The person who joined an existing team is identified as a *Team Member*, and the one who started the team as the *Team Captain*. You can see this information when you manage teams and team members using *Event Admin* for the event.

Team Name ▲	First Name	Last Name	Type ▲
Blackbaud ISD Team	BlackbaudISD	<a href="#">TeamJoiner</a>	Team Member
Event1 Team	TeamLeader	<a href="#">BlackbaudISD</a>	Team Captain

During event registration, a registrant can start a team, join a team, or register as an individual depending on the options selected for *Event Teams* in *Website Features* for the event. If an event registrant joins a team and you have an event group that contains different levels, the participant can select the group level (see example figure below) and then the team to join. The team group must already exist for the event group.

**Join a Team**

Search by Group, Team or both. You can then either join a Team or get Team/Group statistics by clicking on the Team or Group name.

Search	
Locate a Team by selecting a Group or any level underneath it and click 'Select'.	<div> <div>--- Select a Group ---</div> <div> <div>--- Select a Group ---</div> <div>Blackbaud ISD</div> <div>ISD Product Development</div> </div> </div> <div>Select</div>
Or, if you know the team name, enter it here:	<div> <input type="text"/> <div>Search</div> </div>

When participants select a team to join and complete the registration process, you can view their names and registration type information when you manage the company pyramid for the event using *Event Admin* and view team members for the team group (see figure below).

Event Pyramid - Windows Internet Explorer

https://www.kintera.com/CommonLib/Pyramids/EventPyramidBack.aspx?ContactID=34455&EventID=50502

Company Pyramid (1 Top-Tier Groups)

Each section of the table will show 10 records at a time. Use the paging function below to view other records.

New	Edit	Edit												
<div>Company Pyramid</div> <div> <div>1 Blackbaud ISD</div> <div> <div>2 ISD Product Development</div> <div>3 Documentation Team</div> </div> </div>		<table border="1"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td></td> <td>Doh</td> <td>Janet</td> <td>Leader</td> </tr> <tr> <td></td> <td>Participant</td> <td>DocTeam</td> <td>Member</td> </tr> </tbody> </table>		Last Name	First Name	Type		Doh	Janet	Leader		Participant	DocTeam	Member
	Last Name	First Name	Type											
	Doh	Janet	Leader											
	Participant	DocTeam	Member											

You can make teams independent if you no longer want them to be part of a group. You can also make participants independent if you want to remove them from a team.

## Making Teams and Participants Independent

Teams and participants can be part of the company pyramid structure or be independents (see following figure).

Event Pyramid - Windows Internet Explorer

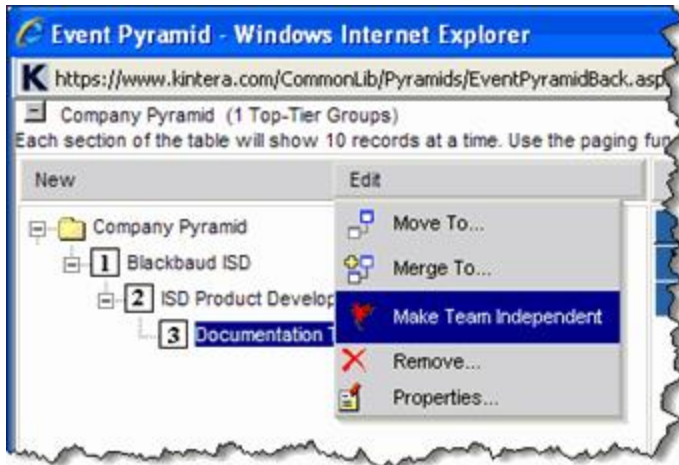
https://www.kintera.com/CommonLib/Pyramids/EventPyramidBack.aspx?ContactID=34455&EventID=50502

Company Pyramid (1 Top-Tier Groups)

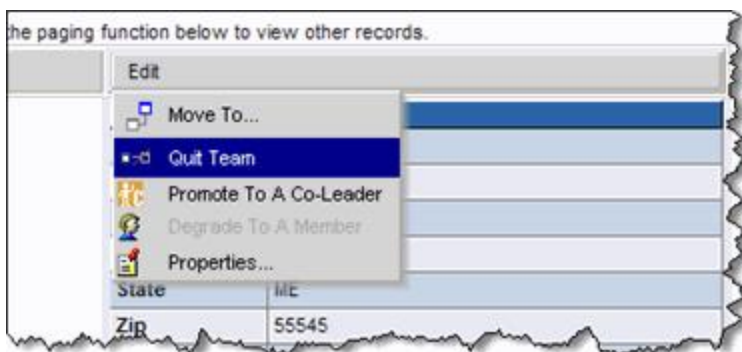
Independent Teams (1)

Independent Participants (3)

When you make a team independent, it will be moved out of the event group level and into *Independent Teams* for the event group. Select the team group from the company pyramid for the event and then click *Edit*. You will see the option for making the team independent.



To make a participant an independent, the participant must quit the team (see figure below). After quitting the team, the participant will be moved out of the team group and into *Independent Participant* for the event.



**Note:** A team leader cannot quit a team if there are participants under the leader.

