Event Coordinator Guide

for stride

Welcome!

Welcome to the Stride Event Coordinator Guide. This guide will address common tasks and questions that may come up for you, the event coordinator, as you prepare for your Down syndrome walk. The first sections illustrate how to handle registration, donation, and sponsorship tasks, and the third section details some of the things you'll want to do in preparation for the day of your walk.

Make sure to check the appendix for printable quick-reference guides on adding registrants, donations, and pages to your site.

This guide works best downloaded and viewed with your computer's native PDF viewer instead of online, so you can take advantage of its features. All of the items in the table of contents are clickable, and all sections are bookmarked in your PDF viewer for easy access.

We hope you find this guide helpful. Don't forget, if you have any questions, you can contact ds-connex through phone or email for support.

ds·connex
Empowering Down Syndrome Communities

445 Hutchinson Avenue, Suite 140
Columbus, Ohio 43235
info@ds-connex.org

Table of Contents

Registration and Updating Registrant Data

Registering someone with check, cash, Square® payment, or other non-Stride credit transaction — 3
Modifying/deleting a payment — 8
Creating a new team — 9
Editing registrant information in administrative mode — 10
Editing team information in administrative mode — 12

Entering Donations and Sponsorship Payments by Cash, Check, Square®, or Other Non-Stride Credit Transactions

Entering cash, check, Square®, or other check donations — 13
Entering sponsorship payments — 17
Modifying/deleting a payment — 21
Approving pending team captain payments — 20

Updating Your Site

Adding a document to your site — 21
Adding a text page to your site — 23
Adding sponsor logos — 24
Updating text on the main fundraising page — 27
Updating the Walk Day Information content — 28

Walk Day Preparation

Emailing Team Captains — 29
Emailing all registrants and donors — 30
Closing registration — 31
Reviewing Team Captain pending payments — 33
Reports available for walk day registration — 33
Finding the total number of shirts and items ordered — 34
General Tips — 36

These are clickable!

Frequently Asked Questions

Registrant and Team Captain Help

Q. Where can I find and change a registrant's lost username or password? — 37
Q. Can registrants change their own username and password? — 37
Q. How can I change a registrant's shirt size? — 38
Q. How can I make an individual's profile invisible so visitors are redirected to their team page instead? — 39
Q. How can I edit a team name or change the team captain? — 40

Site

Q. How do I shrink the file size of an image that's too large to load into Stride? — 41
Q. Part of the sponsor logo is getting cut off. How can I make it fit? — 42

Appendix

Quick-Reference Guide: Registering someone with check, cash, Square® payment, or other non-Stride credit transactions — 47
Quick-Reference Guide: Entering cash, check, Square®, or other check donations — 48
Quick Refernece Guide: Entering sponsorship payments — 49
Quick-Reference Guide: Adding a document to your site — 50
Quick-Reference Guide: Creating a Team — 51

Click here to return to the index.

Registration and Updating Registrant Data

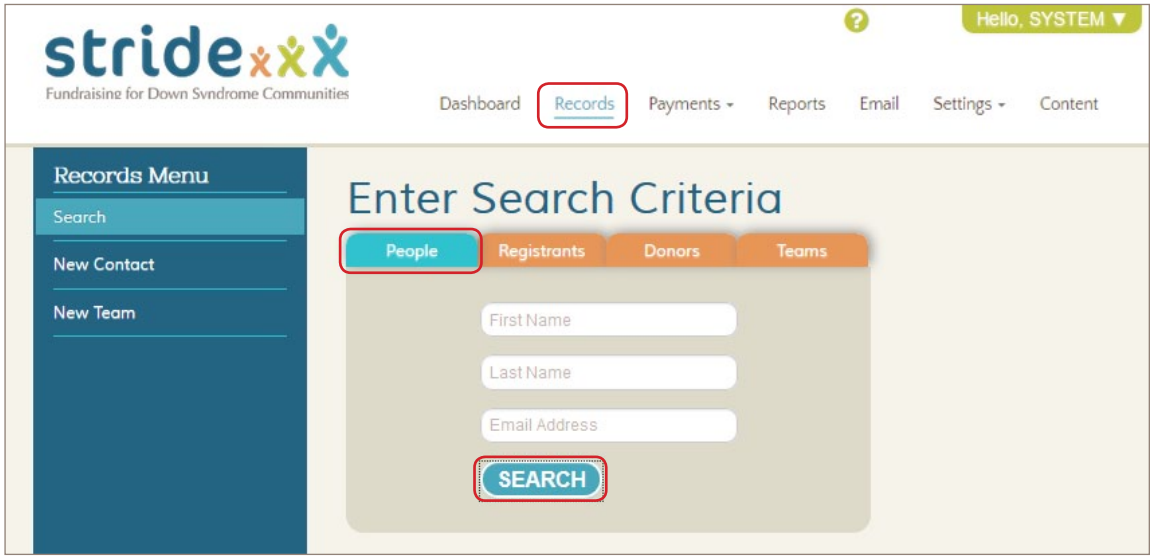
In this section, we'll walk you through how registration works. Users can register themselves on the public side of Stride by using a credit or debit card. However, the administrative side of the site allows you, the event coordinator, to enter cash, check, Square®, or other non-Stride registrations that you may have received.

Registering someone with check, cash, Square® payment, or other non-Stride credit transaction

If the person you are registering is already in the system as a donor or an incomplete registrant, you can search for their account and complete the registration from the back end. Otherwise you'll need to create a new account. If multiple people wish to register with a single payment, like a family with one check, you'll need to create a new contact for each person so that your event reports are accurate, and so that each person will have their own profile on the site. If a family with multiple registrants is purchasing items or donating, add the items and donations under the primary registrant by clicking "New Detail" once you've registered them (more info below).

1. Search for the registrant by selecting the "Records" tab. Click the "People" tab and enter their name, then click Search.

Search for both registrants and donors with the People tab.



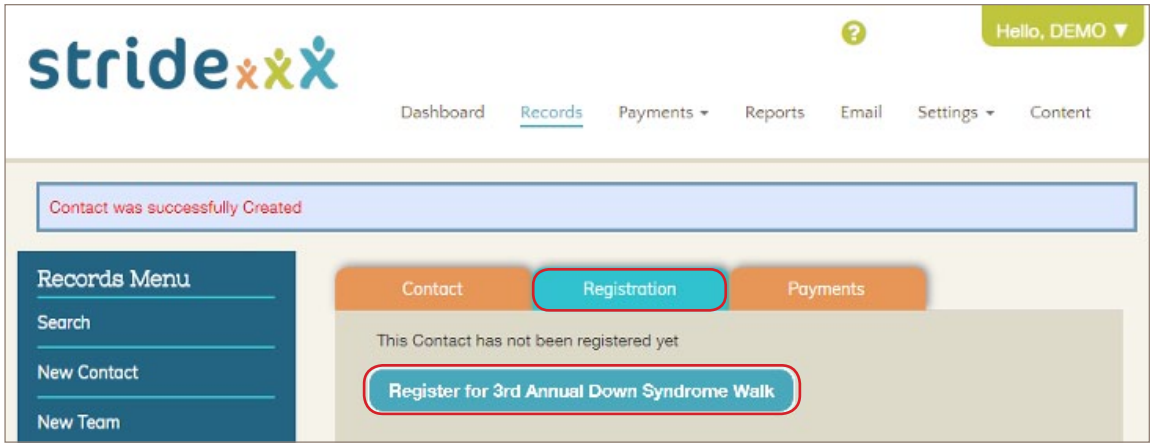
2a. If found, select their name from the list. Use the "Contact" tab to fill out any missing contact information, then save.

Editing contact information.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

2b. If not found, select "New Contact" and complete their contact information, then click Save.

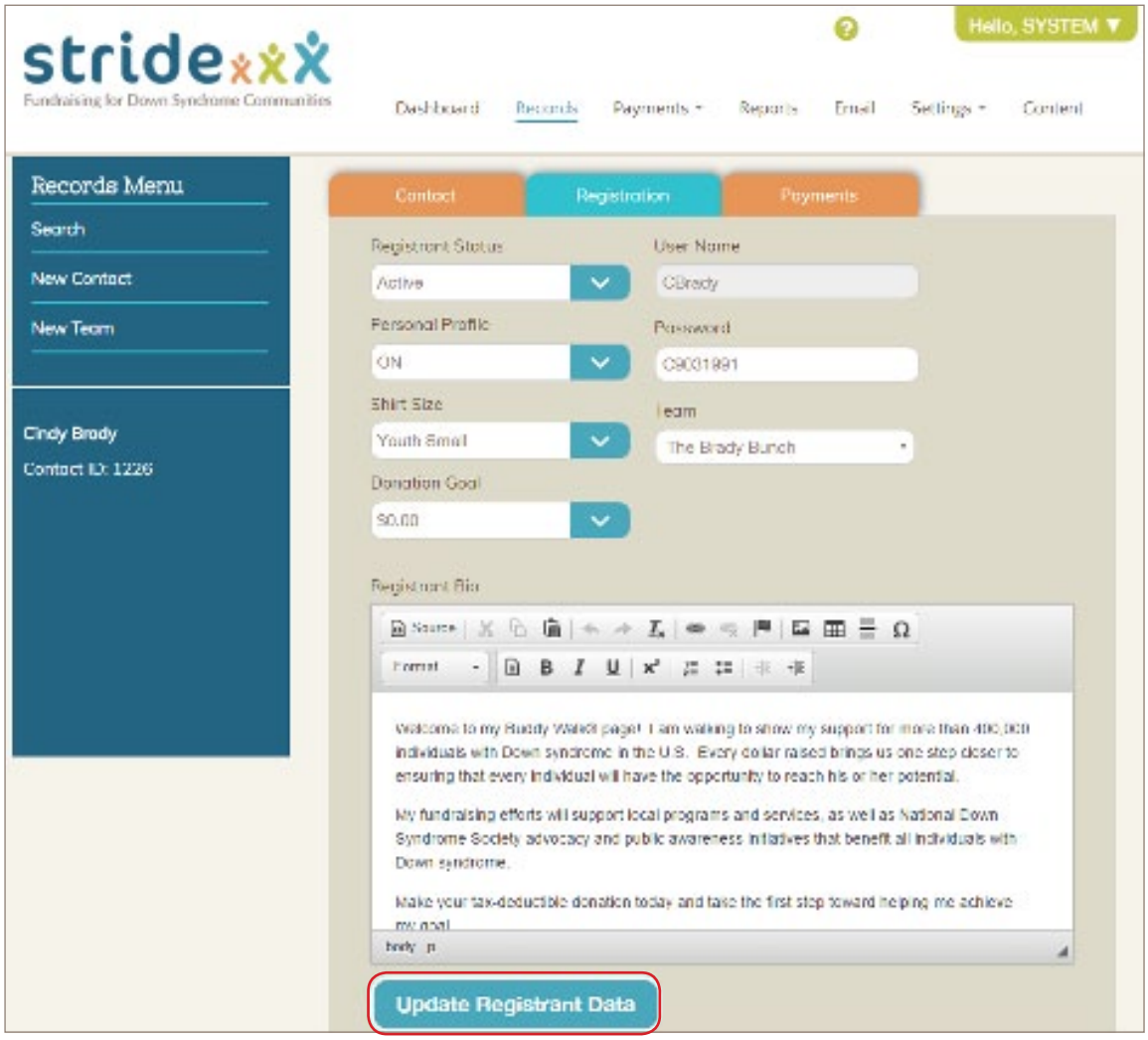
3. **Select the "Registration" tab to begin registration. If the individual has not registered yet, select "Register for Down Syndrome Walk."**



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

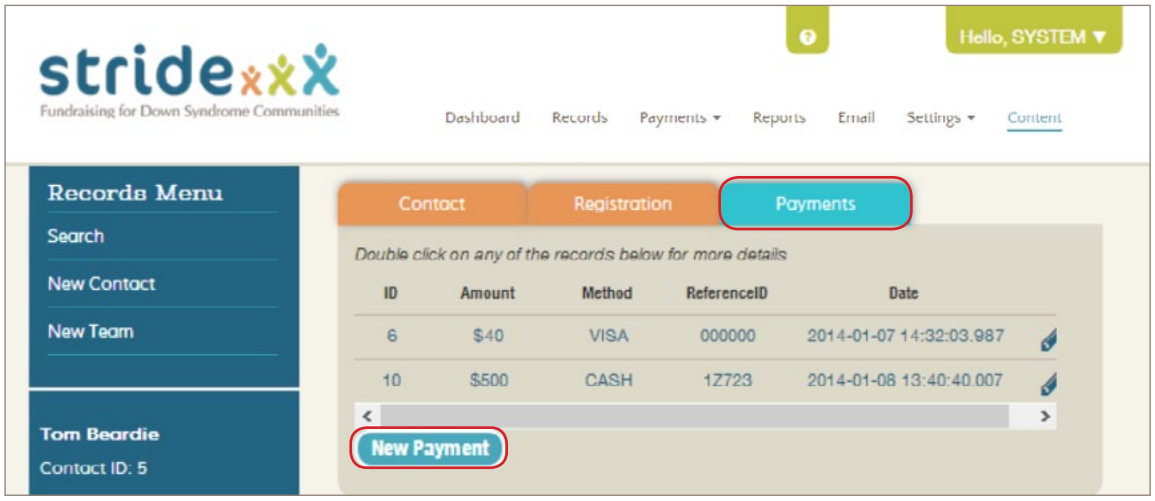
4. **Fill out the registration information and select "Update Registrant Data."**

Editing an individual's registration information.



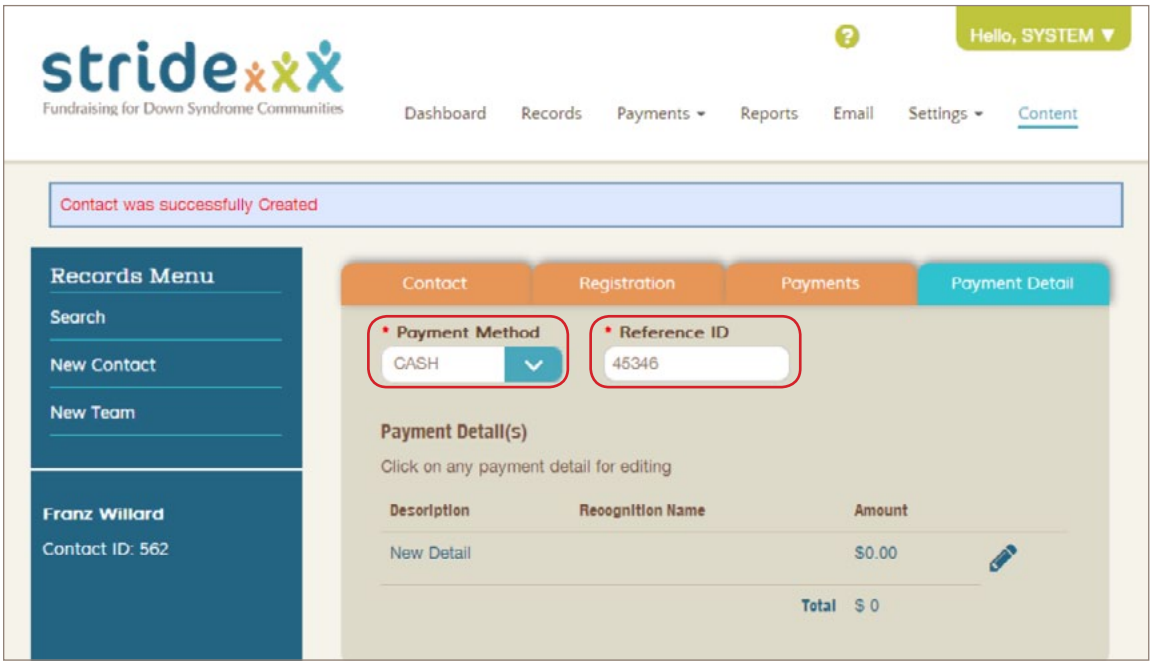
5. **Next, click the "Payments" tab.**

6. **Click "New Payment."**

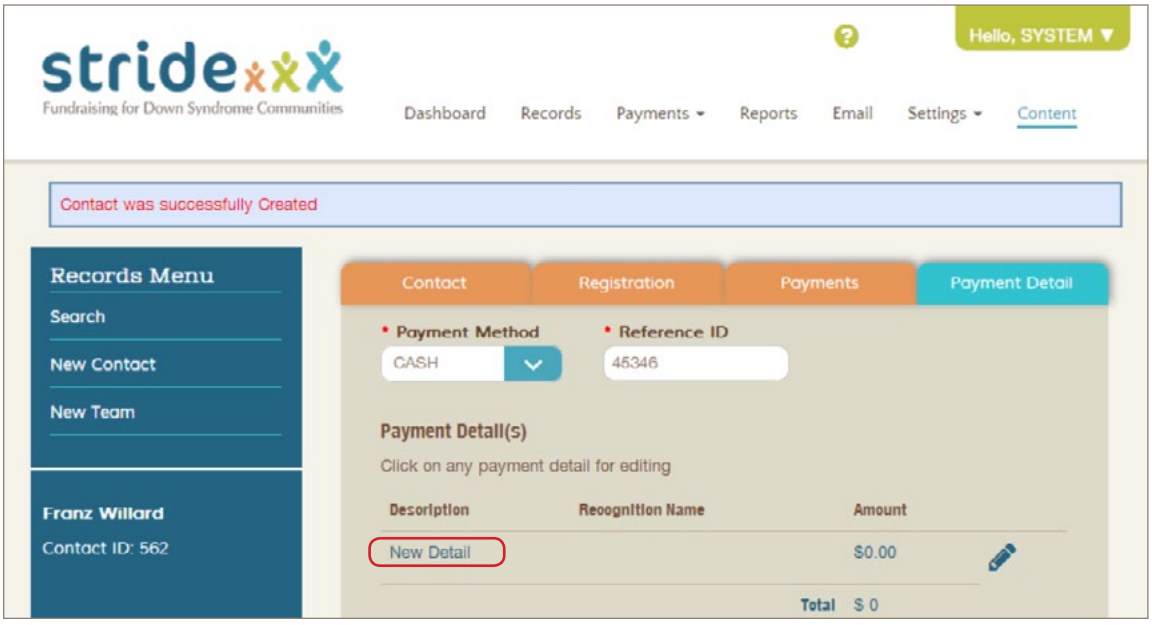


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

7. **Use the "Payment Method" drop-down menu to select Cash, Check, or Credit. Enter a Reference ID. This can be any combination of letters and numbers, If you're registering multiple people with a check, enter the check number in the Reference ID field, then a dash followed by the registrant number. If the check number is 120 and it's the second registrant on that check, you would enter 120 - 2. This will help you stay organized for future reference.**



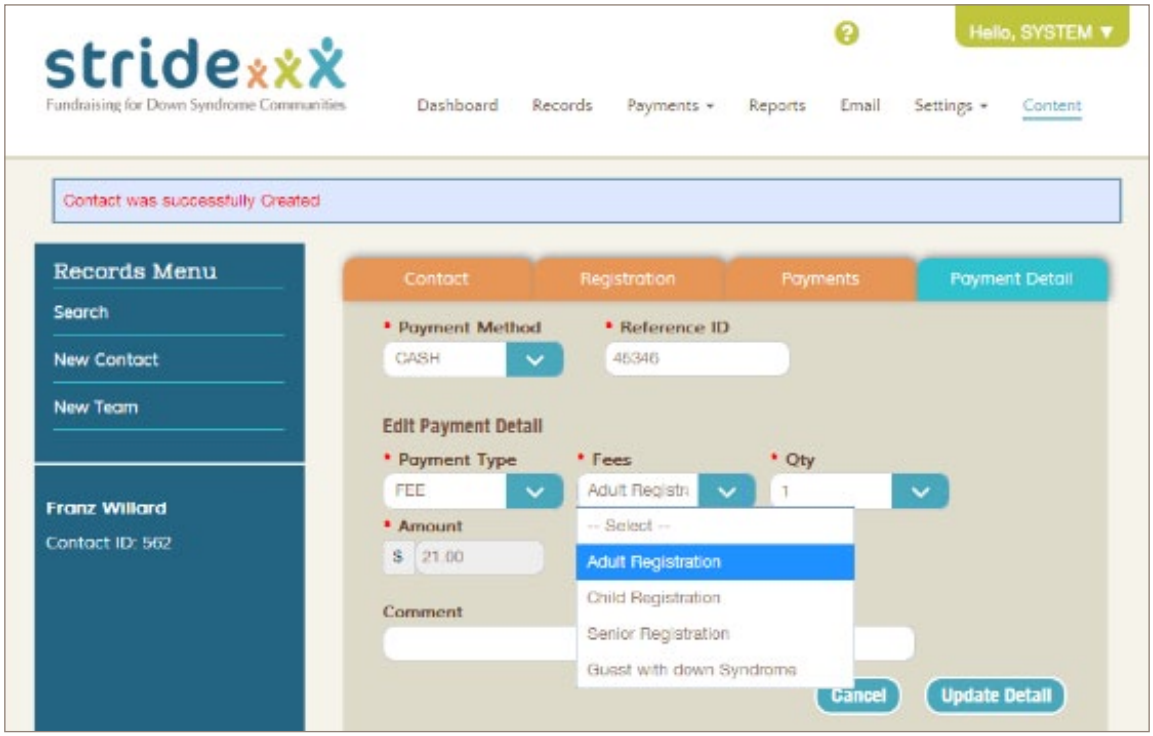
8. **Click "New Detail."**



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

9. Use the “Payment Type” drop-down menu to select Fee.

10. Select the registration type under the “Fees” drop-down menu. Select your fee type and quantity of 1. Even if there is more than one registrant, enter only the first registrant’s fee amount. Additional registrants should each be added under a new contact.



11. When you are done, select “Update Detail.”

12. If you are registering more than one person with the same check, click New Contact and repeat the steps above for each registrant. If a family is donating or purchasing items, click “New Detail” and add all under the primary registrant.

13. Click blue “Save Changes” box when you are done.

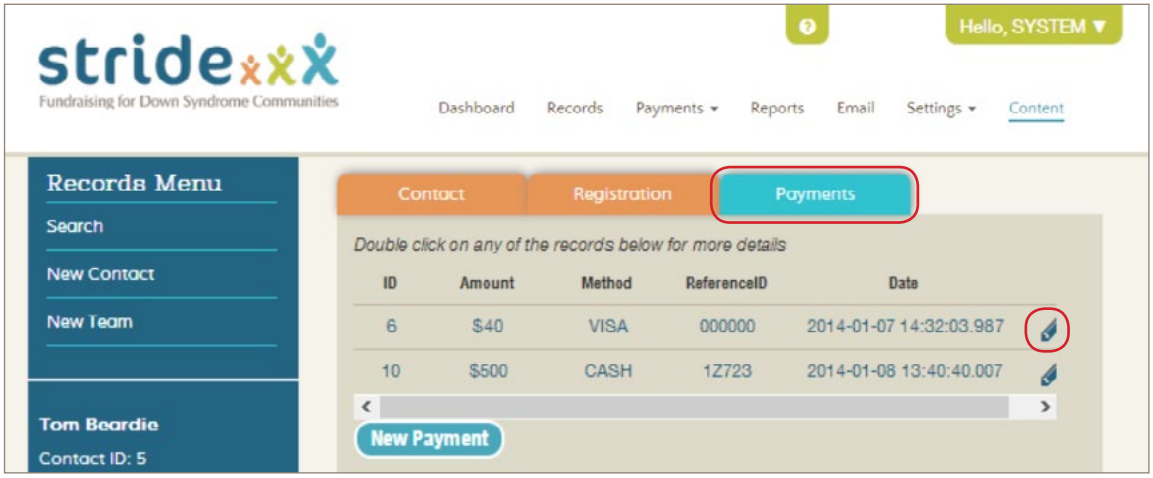
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Modifying / Deleting a Payment

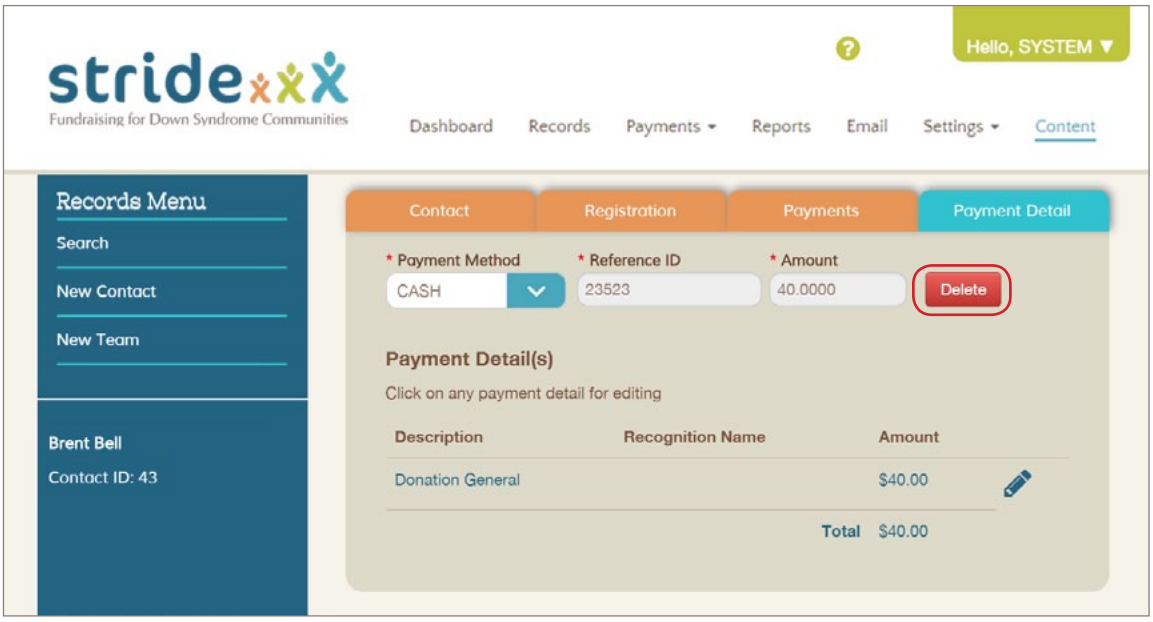
If you have added a payment in the **back end** of Stride that is incorrect, you can delete it and create a new payment in its place. Stride does not allow previously-entered payments to be modified, only deleted and re-entered. Payments created by the public registration and donation processes cannot be changed.

1. **To delete a payment, bring up the registrant or donor's information by going to the Records page from your dashboard, then searching for them.**
2. **Click the Payments tab, then double-click the pencil icon next to the payment you wish to delete.**

The list of all payments under an individual's account.



3. **Next, click the Delete button. If you are modifying an incorrect payment, click the New Payment button and enter the correct data.**

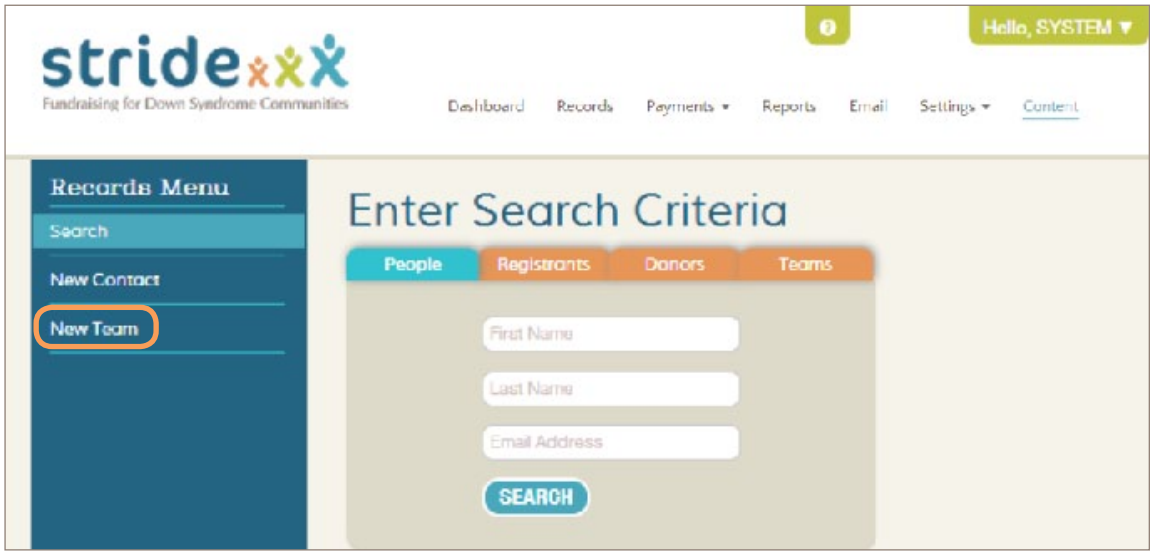


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Creating a new team

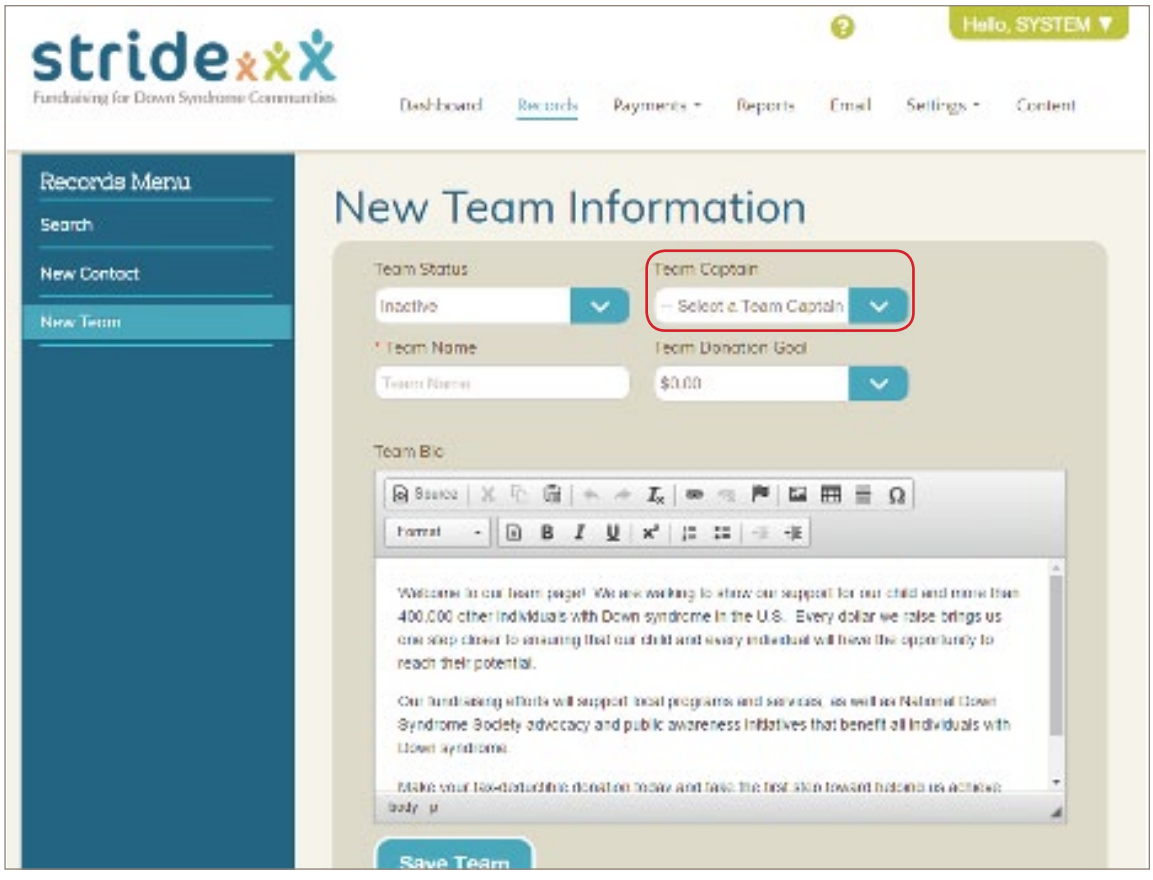
If the new registrant that you added above is a team captain, please complete the next steps to create a new team.

1. **Click "New Team" under the "Records" tab.**



2. **Fill out the blanks on the screen, choosing the account you created earlier as the team captain.**

Editing a team account.



3. **Click Save Team. Your registrant is now the team captain.**

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Editing registrant information in administrative mode

The following registrant information can be changed by the event coordinator and by registrants themselves from the front end of the site.

Contact Tab

- **First Name**
- **Last Name**
- **Address**
- **Business Name**
- **Email**
- **Phone**

Registration Tab

- **Personal Profile ON/OFF**
- **Donation Goal**
- **User Name**
- **Password**
- **Bio**

The following information can **only** be changed from the back end of the site:

Registration Tab

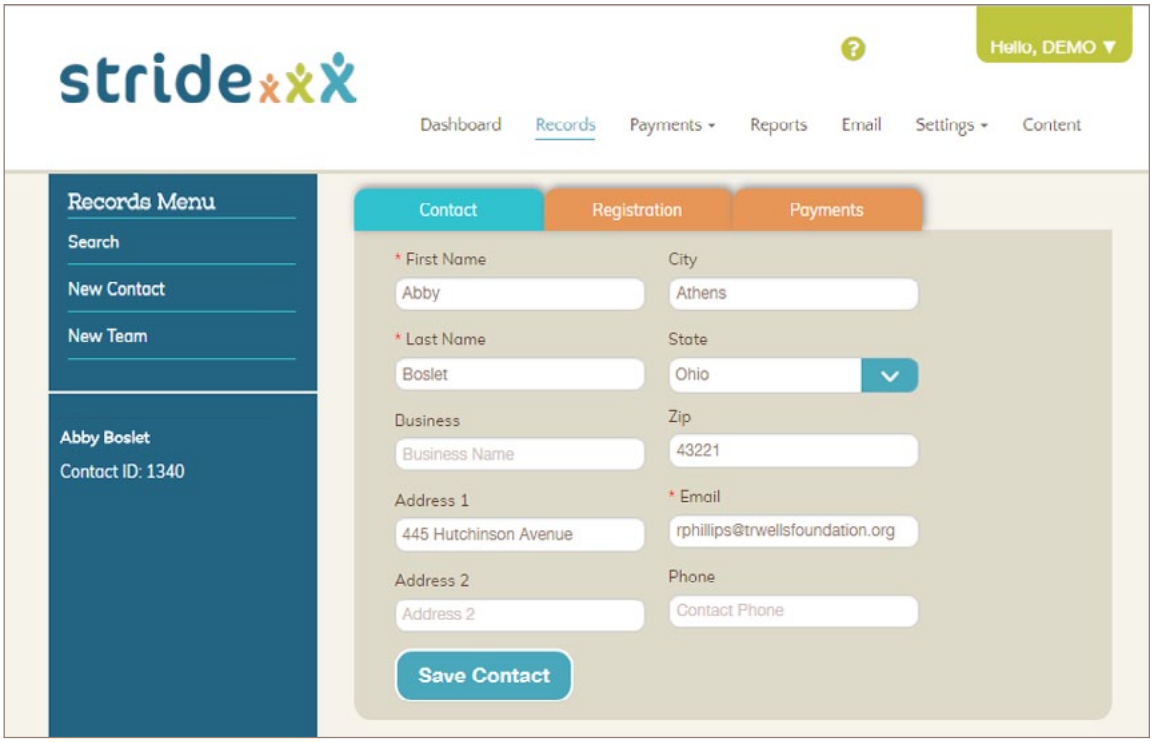
- **Registrant Status**
- **Shirt Size**
- **Team***

*Note: team captains cannot change teams.

To edit the above information:

1. **Click the "Records" tab.**
2. **Select the "Registrant" tab, enter the registrant's name or email, then click Search.**
3. **Select the registrant.**
4. **From the Contact tab, you can update the name, address, business name, email, and phone number on this screen by changing whichever field(s) you want and clicking "Save Contact."**

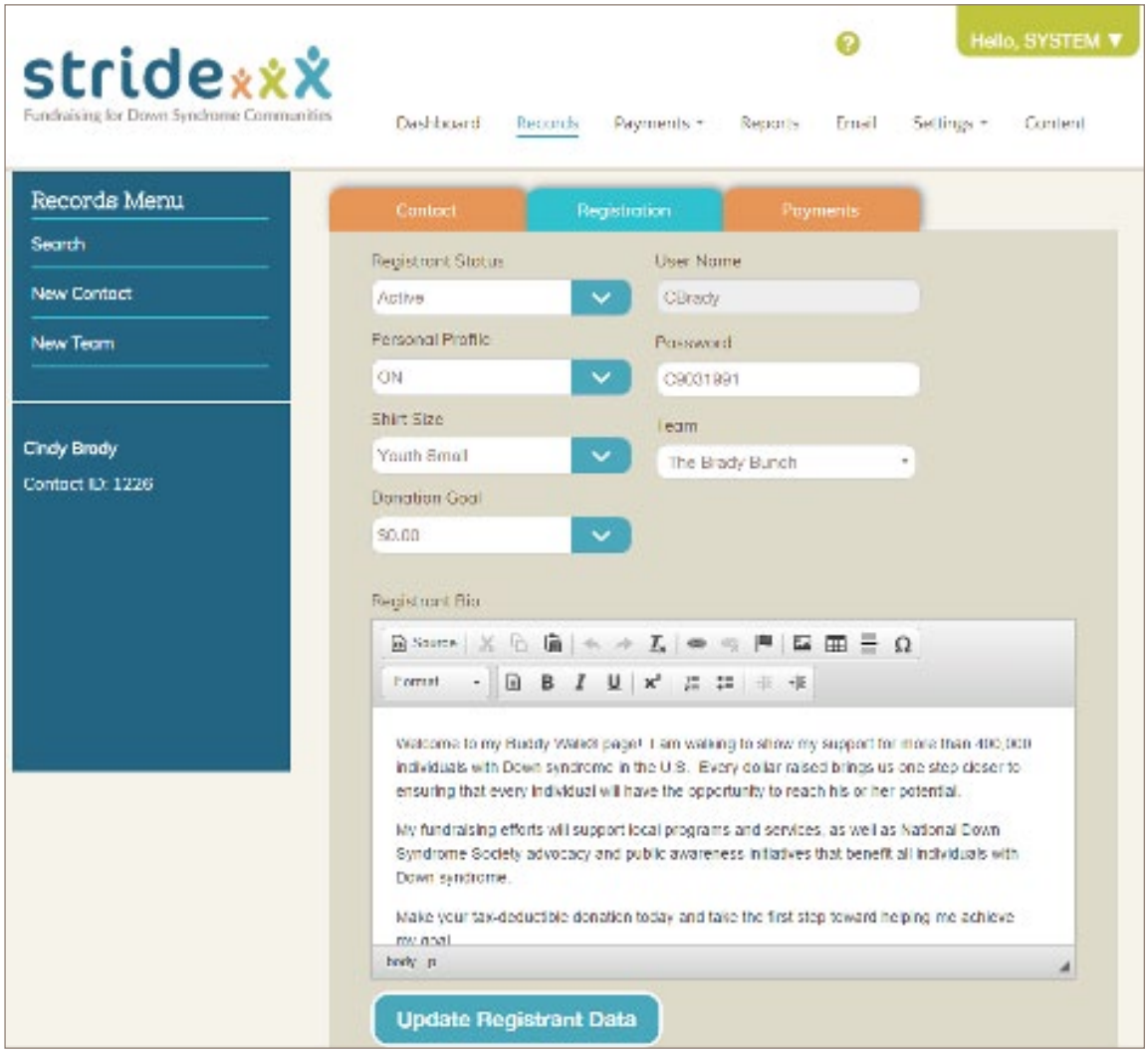
Editing contact information.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

5. **From the Registration tab, you can update username, password, shirt size, team, bio, and donation goal. You can also turn the profile on or off and toggle the registrant status between on and off. Update the field(s) you want and click "Update Registrant Data."**

Editing an individual's registration information.



Note:

A registrant's username and password can be changed by the registrant from their profile page under the "Login" option. If registrants forget their username, they have no way to retrieve it except by requesting it from their event coordinator or emailing support@ds-connex.org.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Editing team information in administrative mode

The following team information can be changed by the event coordinator and by registrants themselves from the front end of the site.

- **Team Donation Goal**
- **Team Bio**

The following information can **only** be changed from the back end of the site:

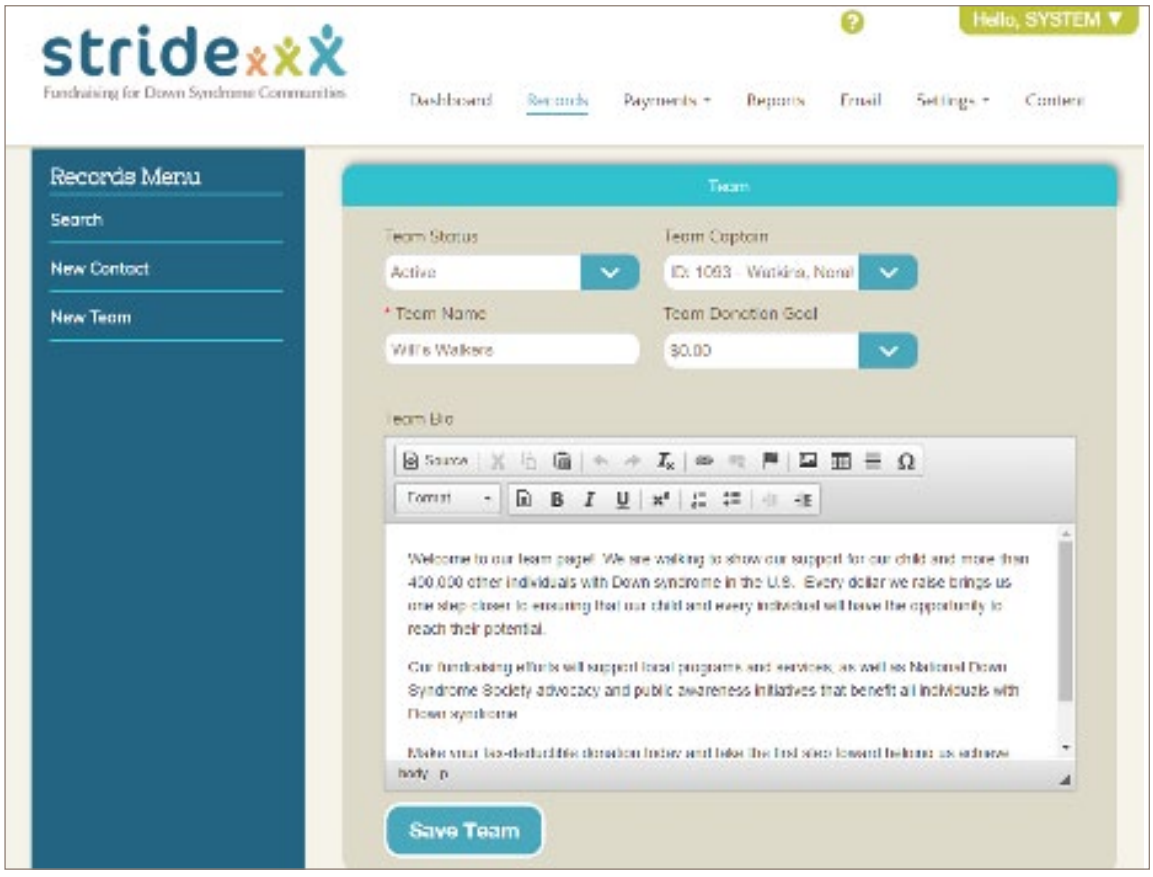
- **Team Name**
- **Team Captain***
- **Team Status**

*Note: to change the team captain, the new captain cannot be assigned to that team already.

To edit the above information:

1. **Click the "Records" tab.**
2. **Select the "Teams" tab, enter the team name, team captain name, or team captain email, then click Search.**
3. **Select the team.**
4. **Edit whichever field(s) you want and click "Save Team."**

Editing a team account.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

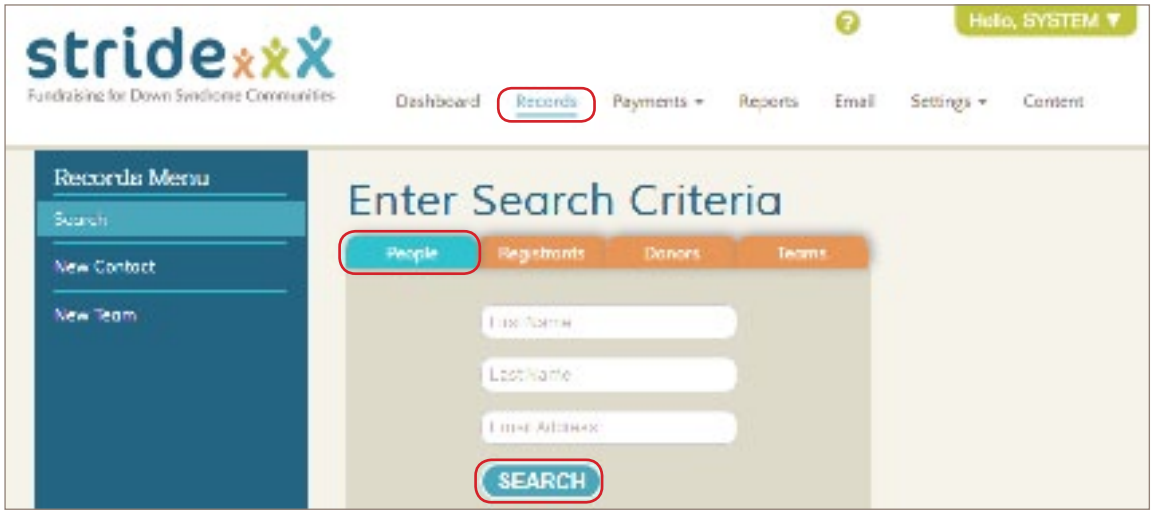
Entering Donations or Sponsorship Payments by Cash, Check, Square®, or other Non-Stride Credit Transactions

Entering cash, check, Square®, or other donations

If the person donating is already in the system as a registrant or incomplete registrant, you can search for their account and complete the donation from the back end. If the donor isn't in the system, you'll need to create a new contact.

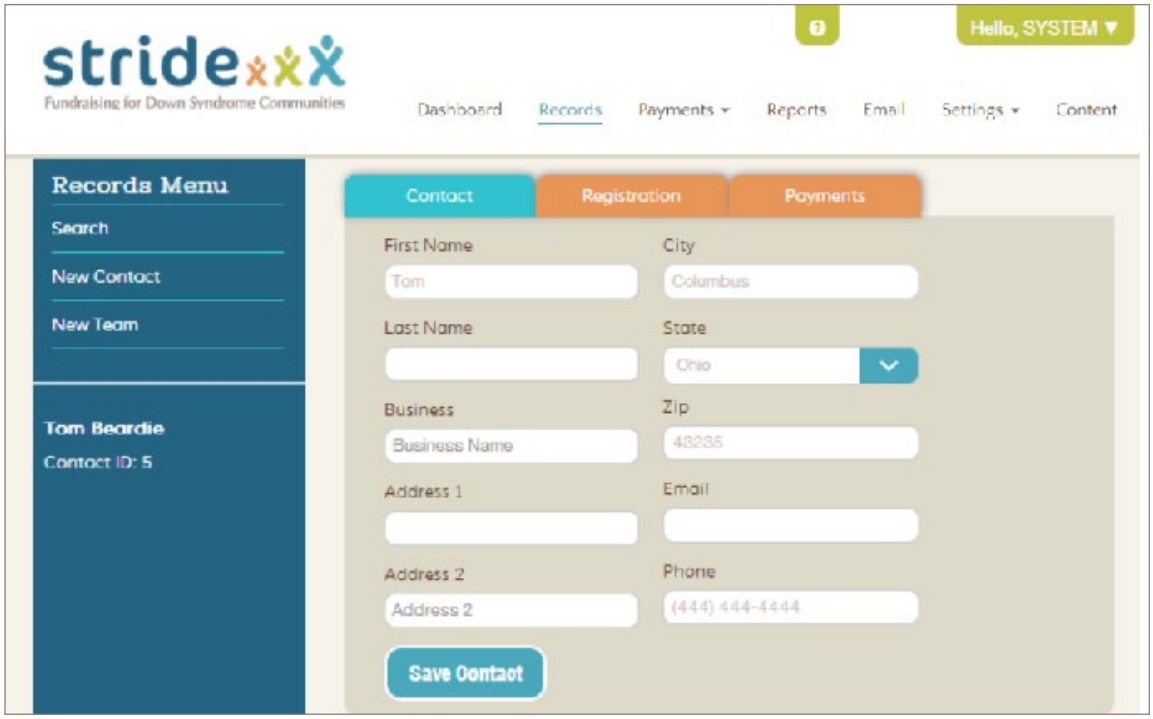
1. **Search for the registrant by selecting the "Records" tab. Click the "People" tab and enter their name, then click Search.**

The "People" tab searches for both registrants and donors.



2a. If found, select their name from the list. Use the "Contact" tab to fill out any missing contact information, then save.

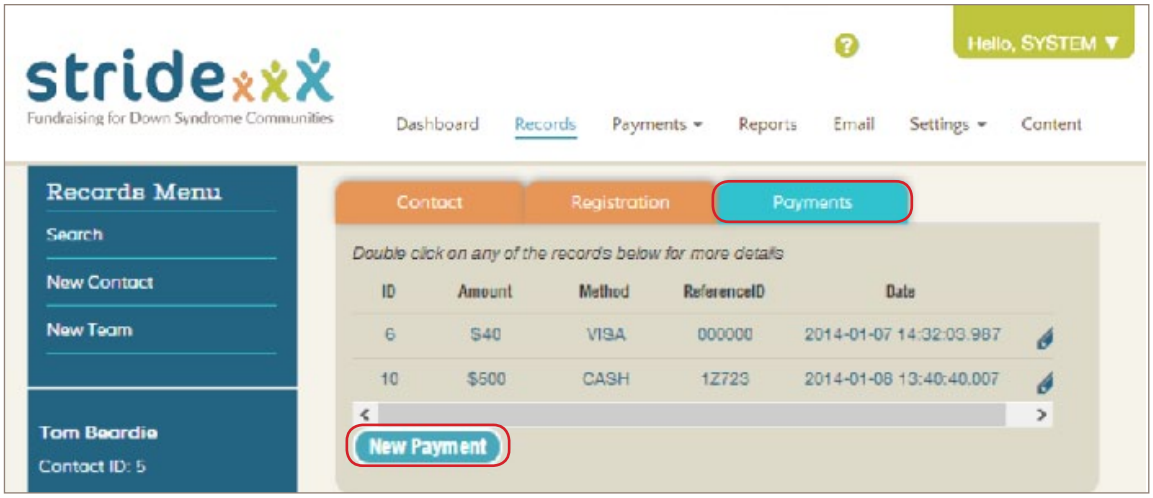
Editing contact information.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

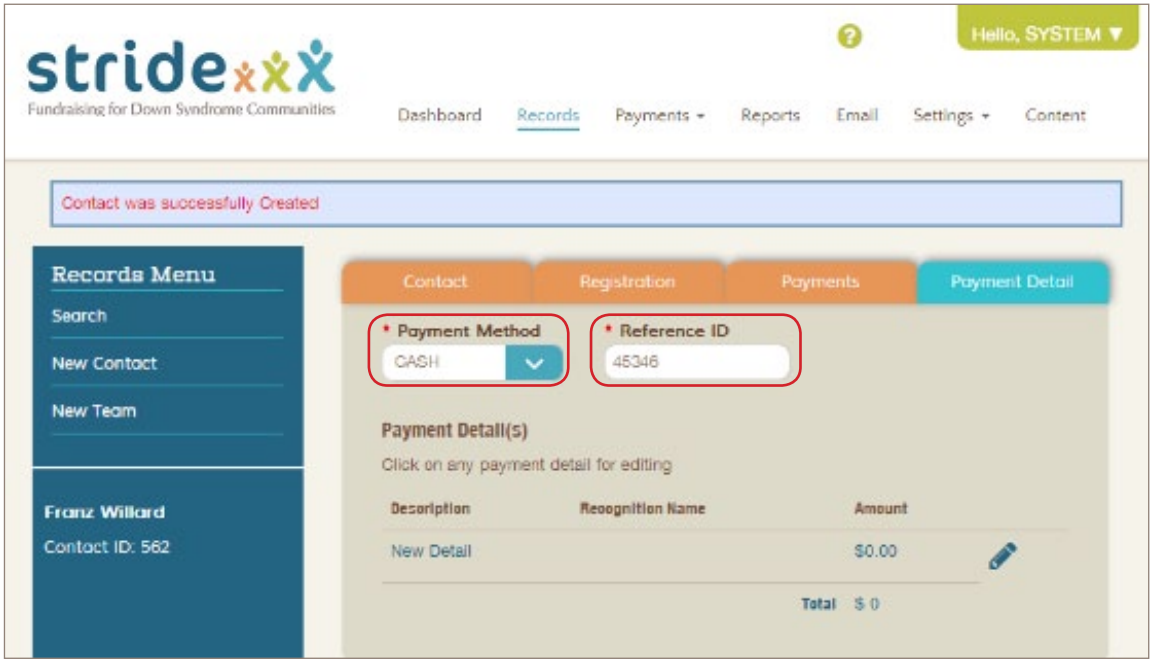
2b. If not found, select “New Contact” and complete their contact information, then click Save.

3. Next, click the “Payments” tab.
4. Click “New Payment.”

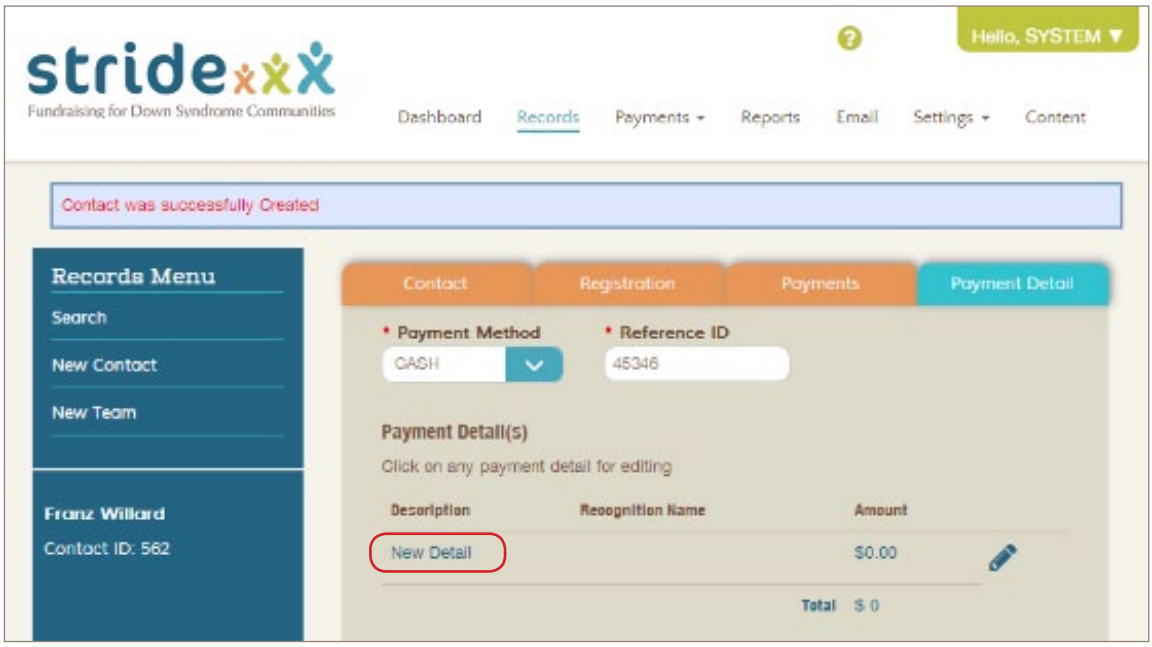


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

5. **Use the "Payment Method" drop-down menu to select Cash, Check, or Credit. Enter a Reference ID. This can be any combination of letters and numbers, If the payment method is check, we recommend entering the check number in the Reference ID field.**



6. **Click "New Detail."**



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

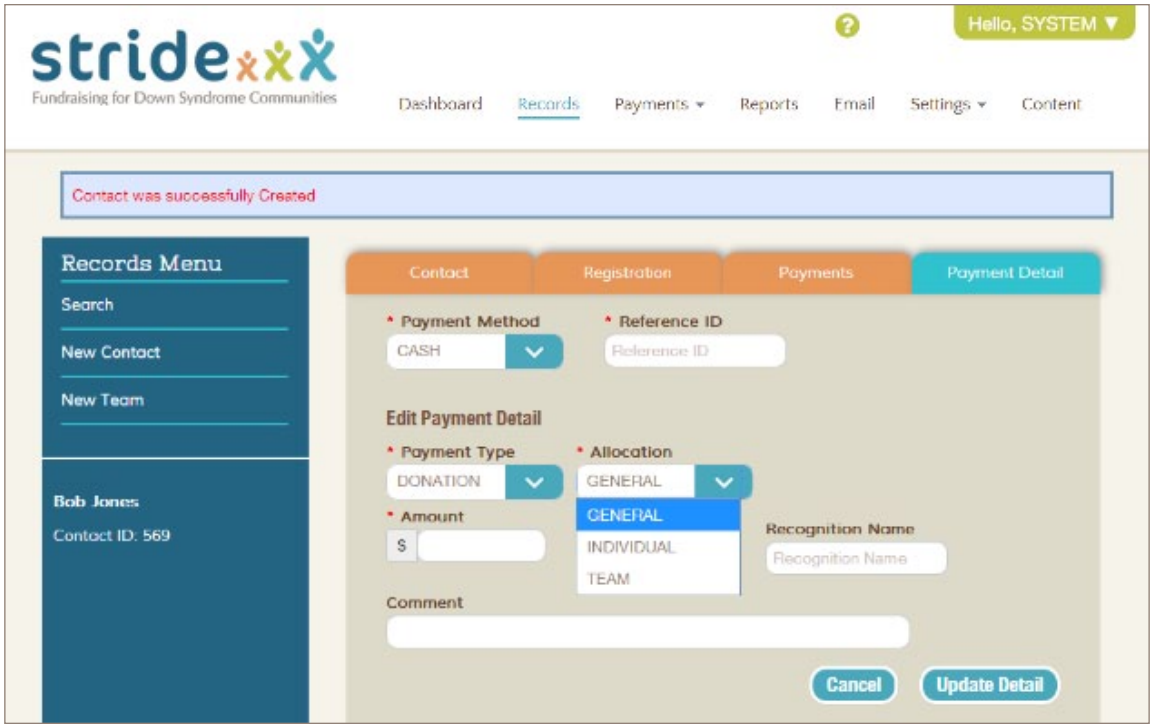
7. Use the “Payment Type” drop-down menu to select Donation.

8. Use the “Allocation” drop-down menu to select GENERAL, INDIVIDUAL, or TEAM. If you’re donating to an individual, use the “Registrant” drop-down menu that appears to the right to select the individual the donation is going to. If you’re donating to a team, use the “Team” drop-down menu that appears to the right to select the appropriate team.

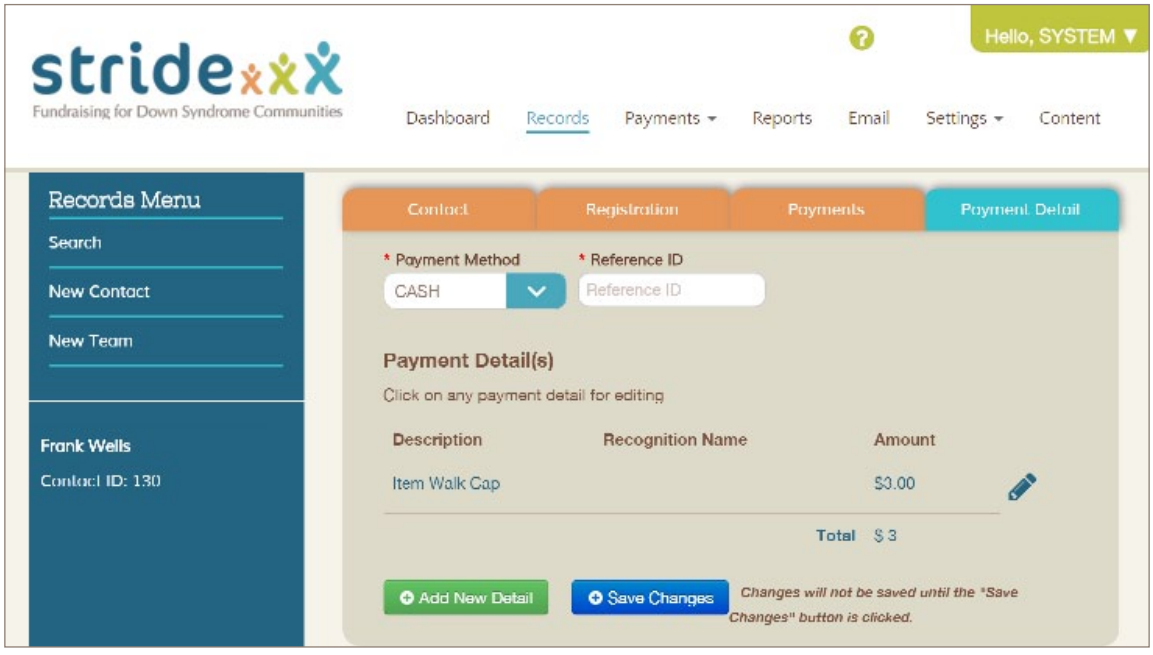
9. Enter the donation amount.

10. If the donation is to be anonymous, click the Anonymous slider to set it to ON. Conversely, if there is a recognition name or comment, enter it in the appropriate box.

11. Select “Update Detail.”



12. When you are done, you can enter another donation if the individual wishes to donate to multiple registrants or teams. Otherwise, click the blue “Save Changes” button.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Entering sponsorship payments

In order to add a sponsor donation so that it's counted by the goal tracker, use the Records tab to create a new contact, then enter the donation amount.

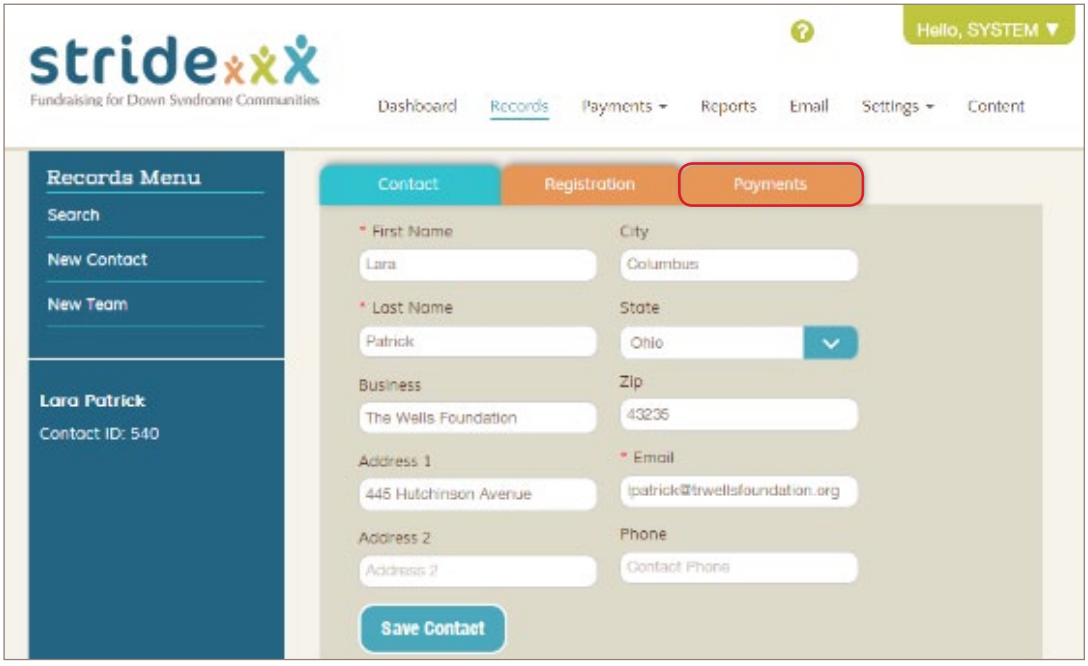
1. **To create a new contact, log into the administrative side of your Stride site, then select the Records tab from your dashboard. Select "New Contact."**

Entering the account information for the new contact.

2. **Fill out the required fields. You need to have a person / email address associated with the Business Name, so make sure to fill out all of these fields. Then, hit "Save Contact."**

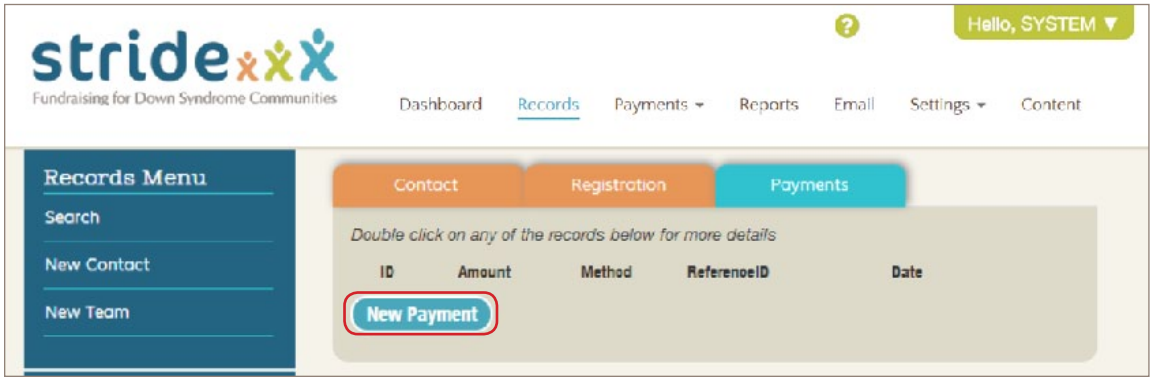
3. **Next, you can enter the sponsorship amount you received as a payment under the new contact you just created. Click the "Payments" button.**

This screen is what comes up after you create a new contact.

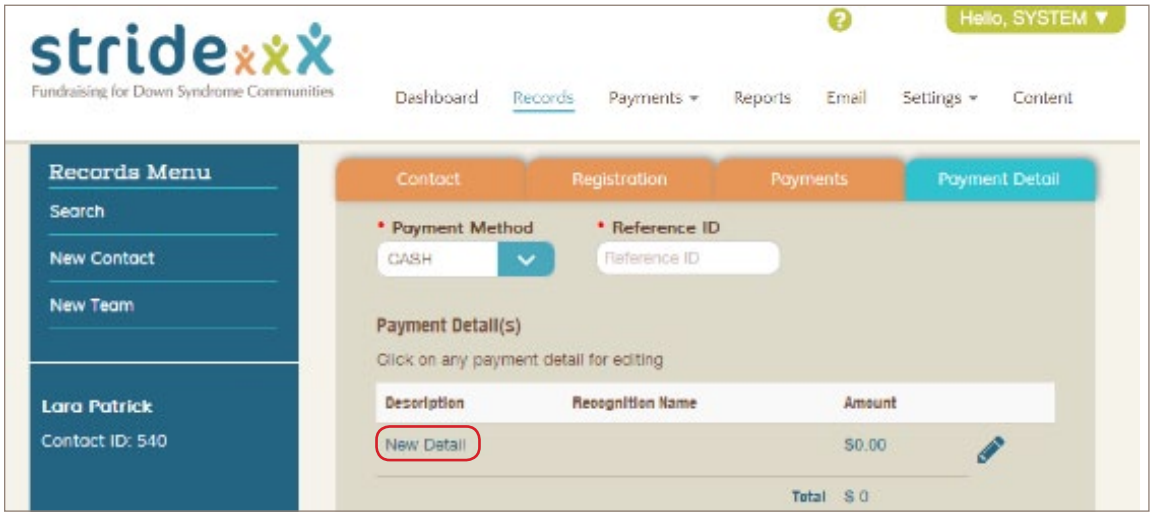


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

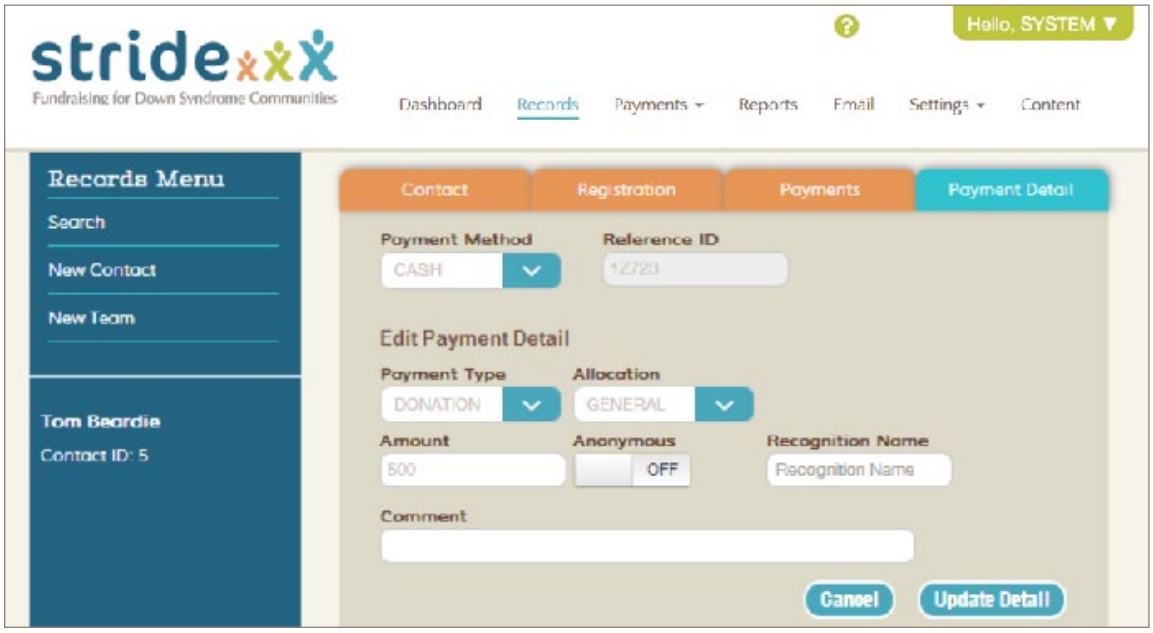
4. Click “New Payment.”



5. Select “New Detail.”



6. Enter the information associated with the payment. The Reference ID field can be used to enter check numbers or other data as you see the need. You can use the Comment field to designate the payment as a sponsorship or sponsorship level such as gold sponsor. When you’re done, click Update Detail.



7. Click “Save Changes.” The goal tracker on your site will be updated with the new sponsorship funds.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

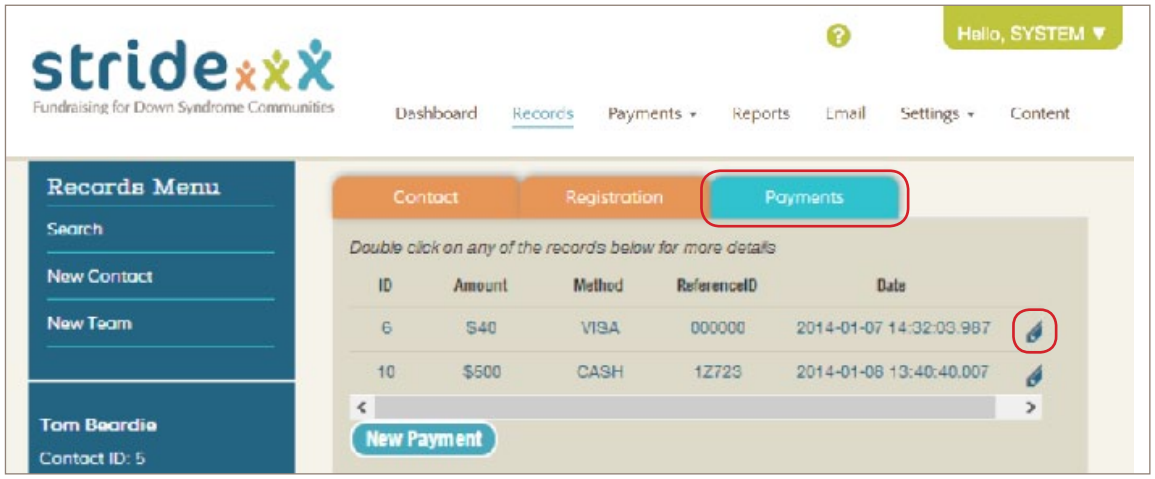
Modifying / deleting a payment

If you have added a payment in the back end of Stride that is incorrect, you can delete it and create a new payment in its place. Stride does not allow previously-entered payments to be modified, only deleted and re-entered.

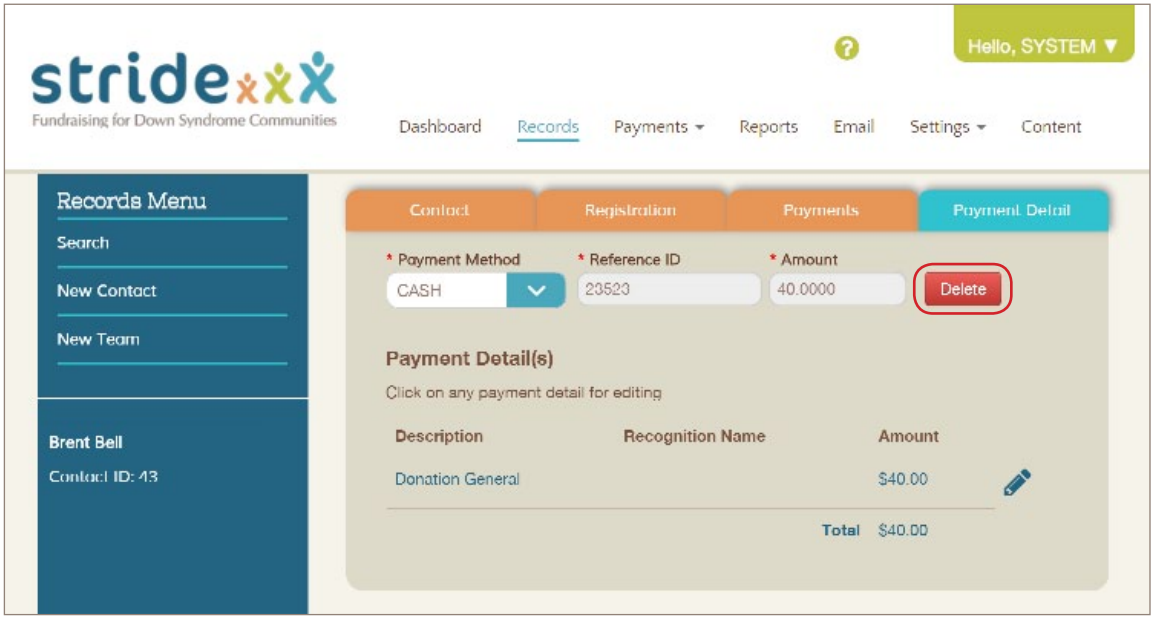
1. **To delete a payment, bring up the registrant or donor's information by going to the Records page from your dashboard, then searching for them.**

2. **Click the Payments tab, then double-click the pencil icon next to the payment you wish to delete.**

The list of all payments under an individual's account.



3. **Next, click the Delete button. If you are modifying an incorrect payment, click the New Payment button and enter the correct data.**



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Approving pending team captain payments

Because people sometimes like to make team donations in the form of cash or check given directly to their team captain, Stride can be set to allow team captains to enter pending payments. The team's total amount raised will be updated instantly. That way, competitive teams can keep their amount raised updated by the minute, without having to wait for the event organizer to update their total.

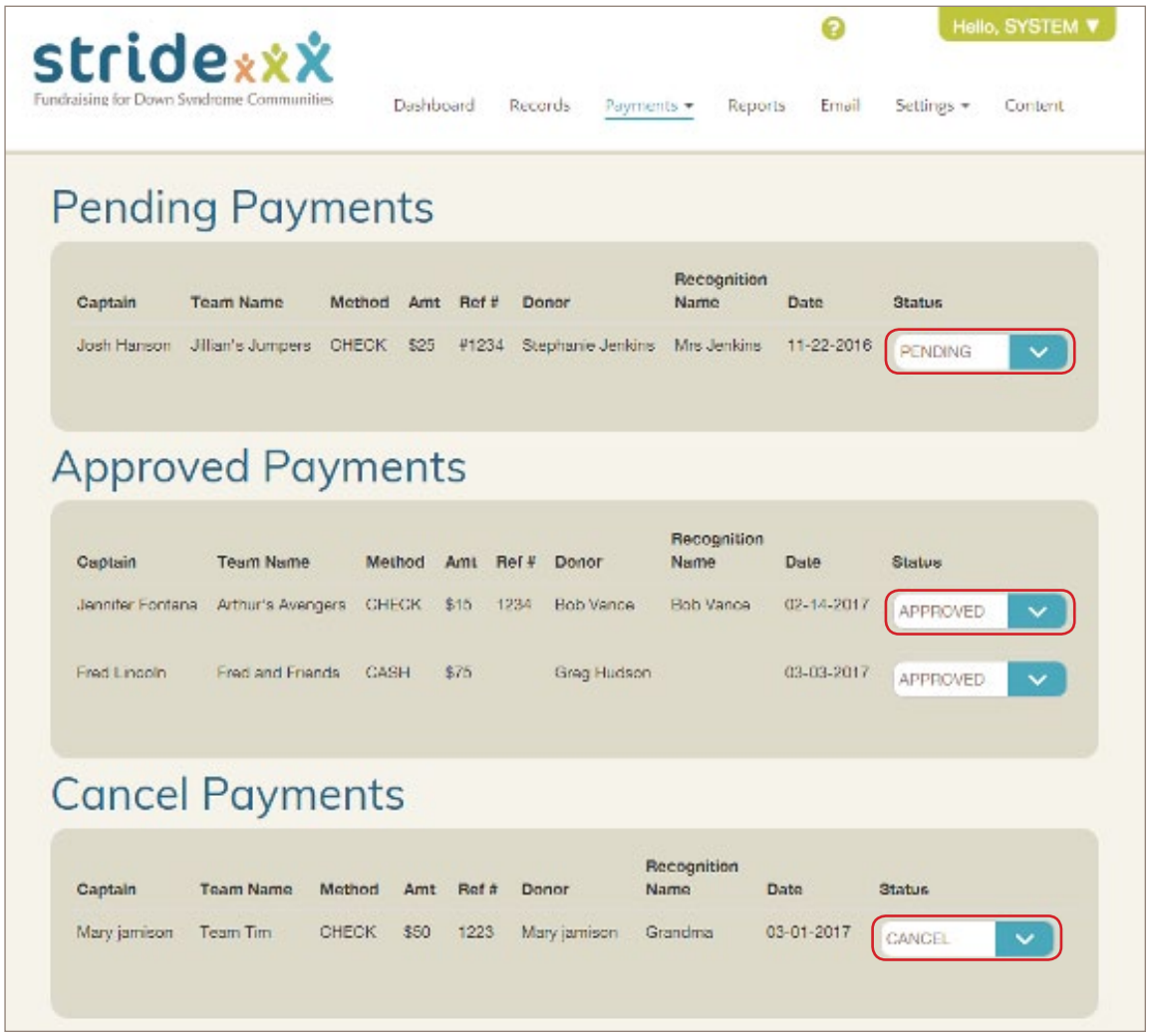
Once the event coordinator receives the payment, they can go to the Payments section of Stride and approve the payment, or cancel it if no money is ever received.

To turn this functionality on, go to Settings > Optional Form Fields and set "Team Captain Enter Payments" to YES. Once this option is set to YES, you can see pending, approved, and cancelled team captain payments under Payments > Edit Team Payments.

Once you receive a cash or check payment in person, you can change its status from pending to approved by going to Payments > Edit Team Payments. All pending payments will be listed in the Pending Payments section. To change the status, use the drop-down menu under "Status" and select PAID.

If you never receive a payment, you can cancel the payment by using the drop-down menu under "Status" and selecting CANCEL. This will subtract the funds from the team's total. You can change the status of a payment at any time by using the same drop-down menu. After you change the payment status, the page will automatically refresh and the payment will be moved into the appropriate category.

You can approve or cancel payments from the Team Payments screen.



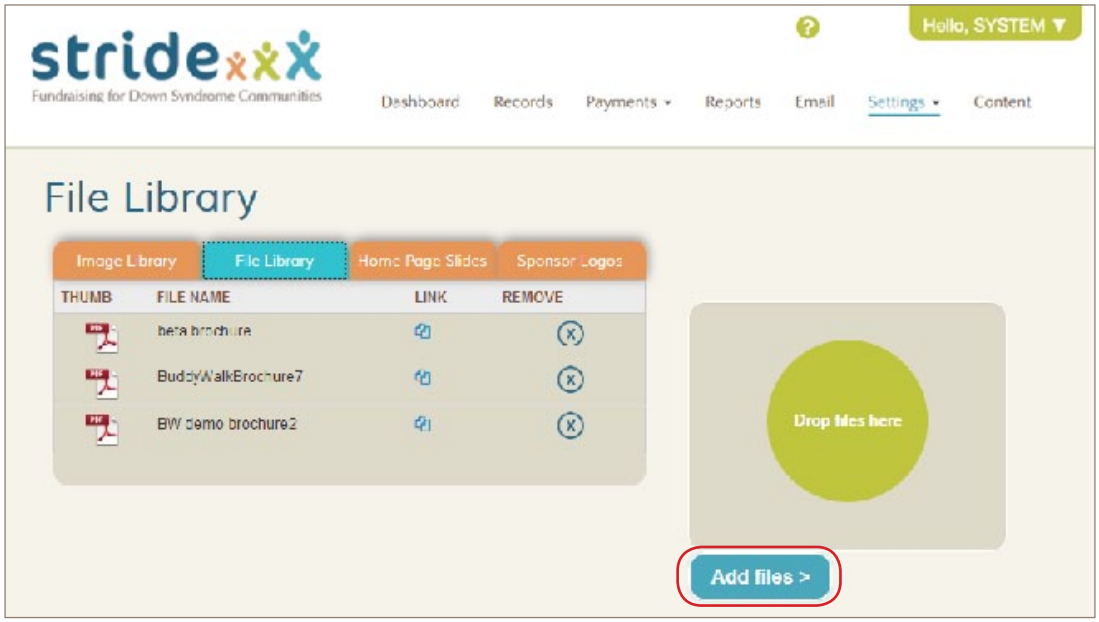
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

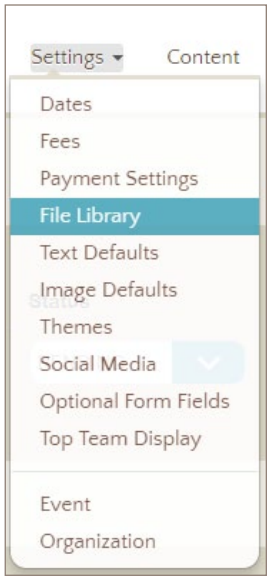
Updating Your Site

Adding a Document to Your Site

Content pages are great for publishing things like FAQs, event information, and brochures. There are two types of content pages you can add: a link to a PDF, which will open a new tab to an external page when clicked, and text.

1. **To add a PDF document to your site, you need to first upload it to the File Library. On the administrative side of Stride, click Settings, then File Library (see right). Next, select Add Files.**





Above: Go to Settings, then File Library.

Left: Adding a new file.

2. **Browse for and select the file you wish to upload, then click Open. Allow the file to load, then refresh the page (one way to do this is by holding down Ctrl and pressing the r key).**
3. **Next, click the** **icon in the Link column (right).**
4. **Copy the link in the box that comes up by pressing Ctrl+c or right-clicking and then selecting Copy (see lower right). Click OK to close the window.**

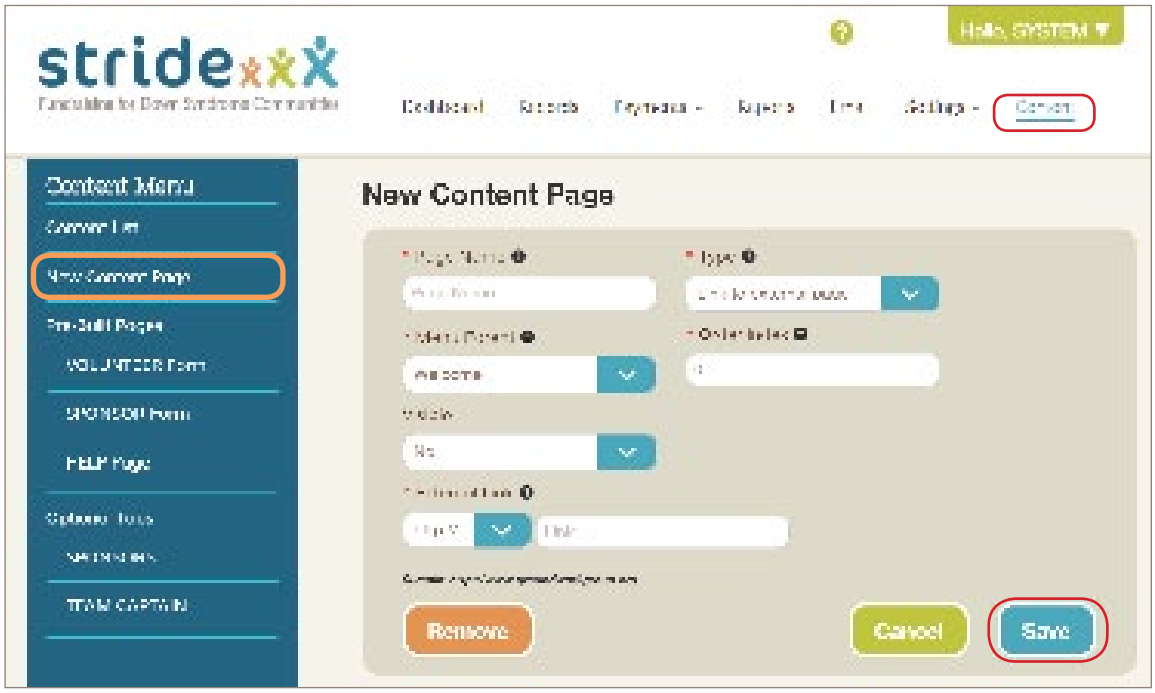
Click the folders icon to pull up the link.

Copy the link from the pop-up box.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

5. Now that you have the link in your clipboard, click on Content, then New Content Page (see below).
6. Enter the name of your page in the Page Name text box. Then, use the "Type" drop-down menu to select "Link to external page."
7. Next, choose which tab you want your new content page to fall under by using the "Menu Parent" drop-down.
8. Enter a number in the Order Index box. This is what number the new page will appear under its parent tab. Enter "1" to make it the first page on the list, "2" for second, and so on.
9. Set the "Visible" drop-down menu to "Yes." This makes the page visible on the public site. You can make a page invisible if you don't want it on your site but might decide to bring it back in the future.
10. Finally, paste the link that you copied earlier into the External Link box at the bottom of the page. You can do this by right clicking the box and selecting Paste, or pressing Ctrl+v on your keyboard. Don't worry about the drop-down menu to its left.
11. Now, click Save. Your PDF will appear on your home page under the tab you chose.

Fill out the boxes to add your file.

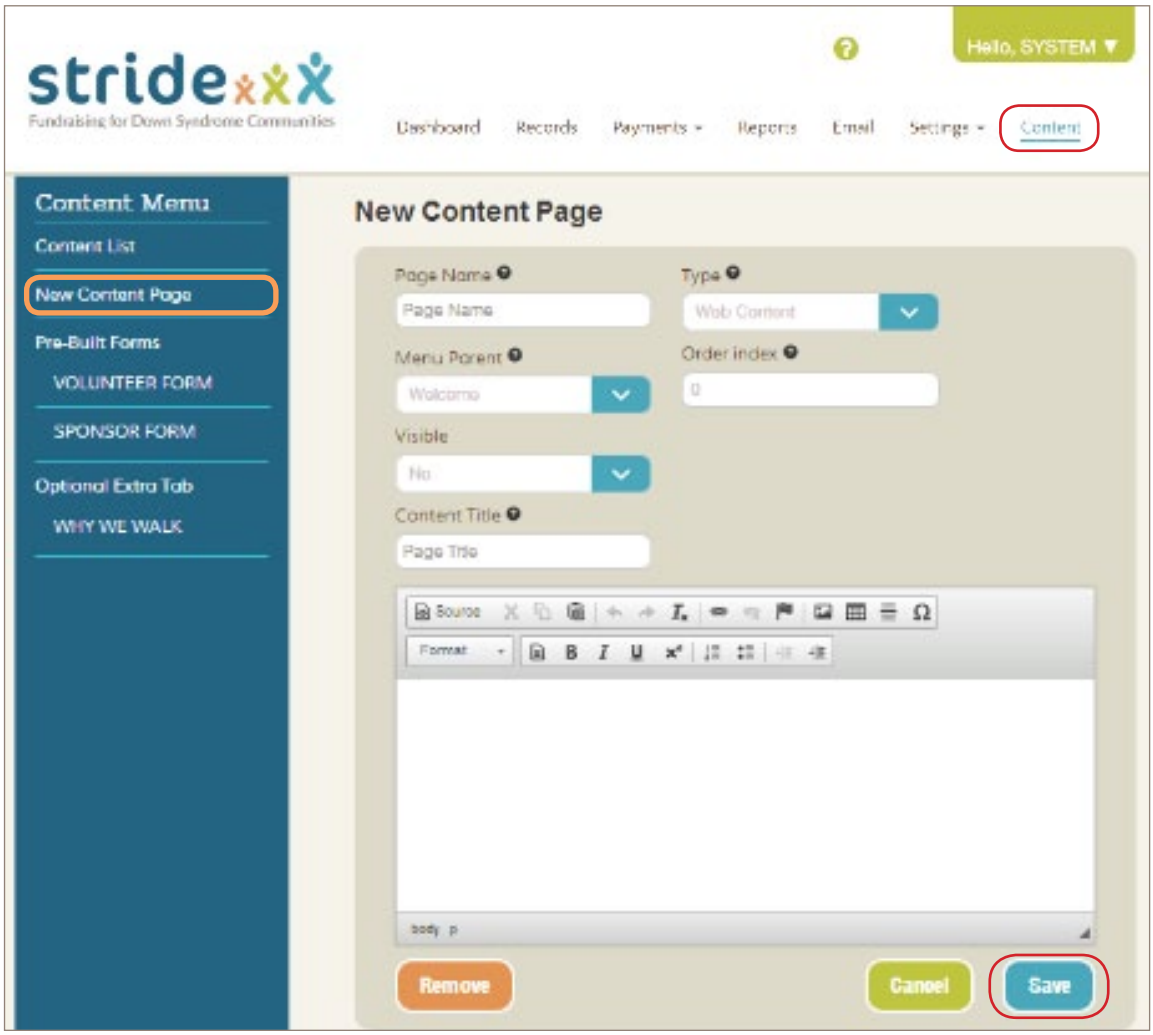


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Adding a Text Page to Your Site

If you want to add a tab with text on your site, like walk day information, you can do this by going to the Content page from your dashboard. It is the farthest-right link (see below).

1. **Click "New Content Page" on the left side of the page.**
2. **Fill out the Page Name. This is what will show up when you click the tab that it is under.**
3. **Next, choose which tab you want your new content page to fall under by using the "Menu Parent" drop-down.**
4. **Enter a number in the Order Index box. This is what number the new page will appear under its parent tab. Enter "1" to make it the first page on the list, "2" for second, and so on.**
5. **Next, set the "Visible" drop-down menu to "Yes." This makes the page visible on the public site. You can make a page invisible if you don't want it on your site but might decide to bring it back in the future.**
6. **Enter a title. This will appear at the top of the page.**
7. **Then, either type the text you want in the text box, or paste it from Word. You can edit the text much like you would in a word processor.**
8. **When you're done, click Save. Your new web content will appear under the menu item that you specified, in the order you chose.**



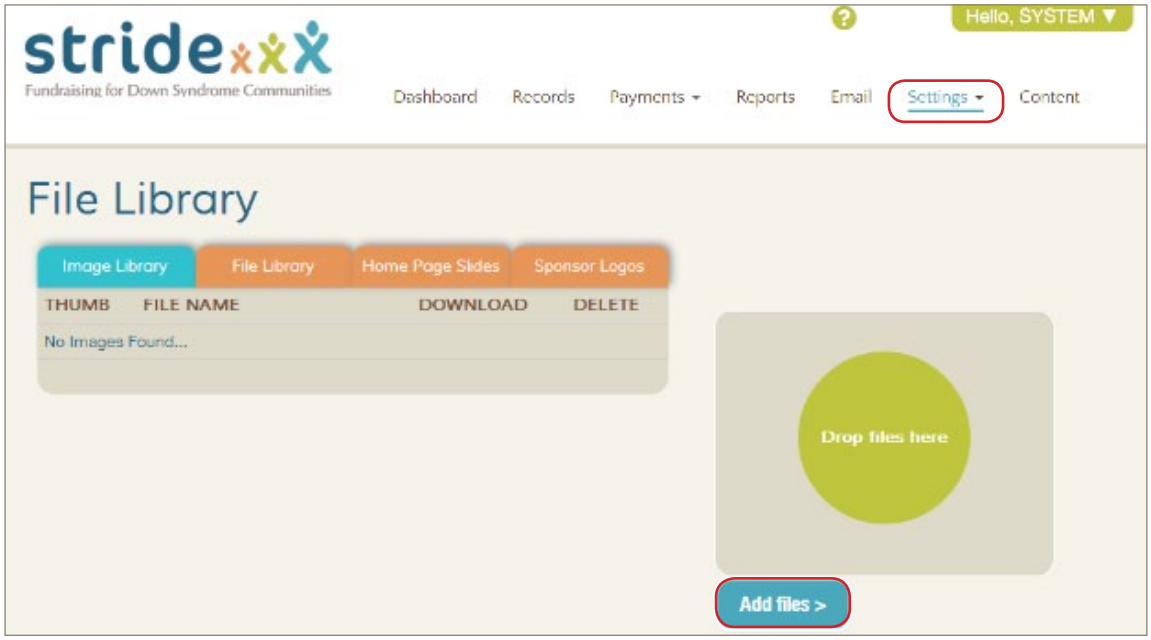
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Adding Sponsor Logos

To add a sponsor logo to your site, you must first add it to the Image Library. To add an image to the Image Library...

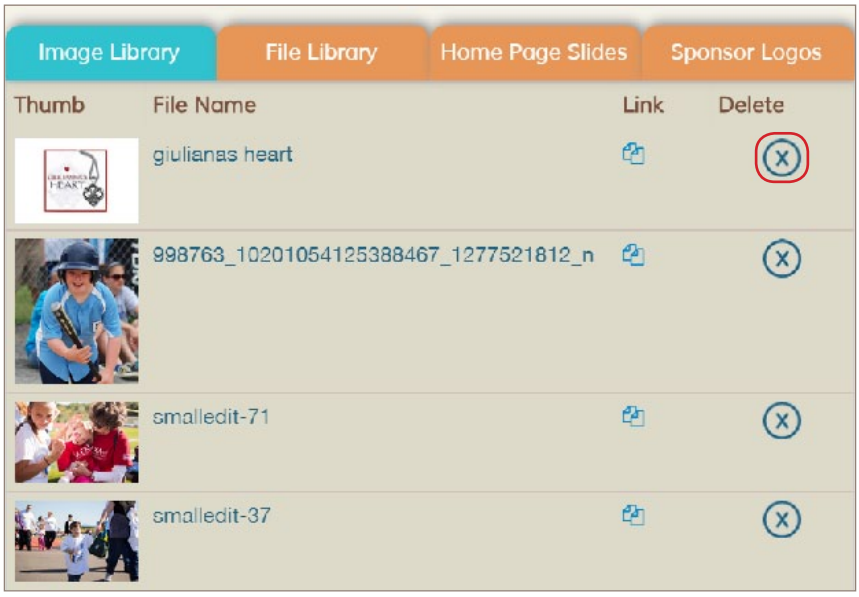
1. **Go to Settings > File Library.**
2. **Select Add Files at the bottom-right of the screen.** *Make sure the image does not have a period or apostrophe in its file name.*
3. **Once you have selected a file from your computer's file directory, click Open. The image will be added to your library for use anywhere you can use images on your site.**

The File Library page, before any files have been uploaded.



To delete an image, click the Delete icon. If you need to for any reason, you can access the hosting location by clicking the link icon to the right of a picture. If you copy the link in the box that pops up and paste it into your browser, you can download or link to the image.

The File Library page, with some uploaded images. From here, you can download or delete them.

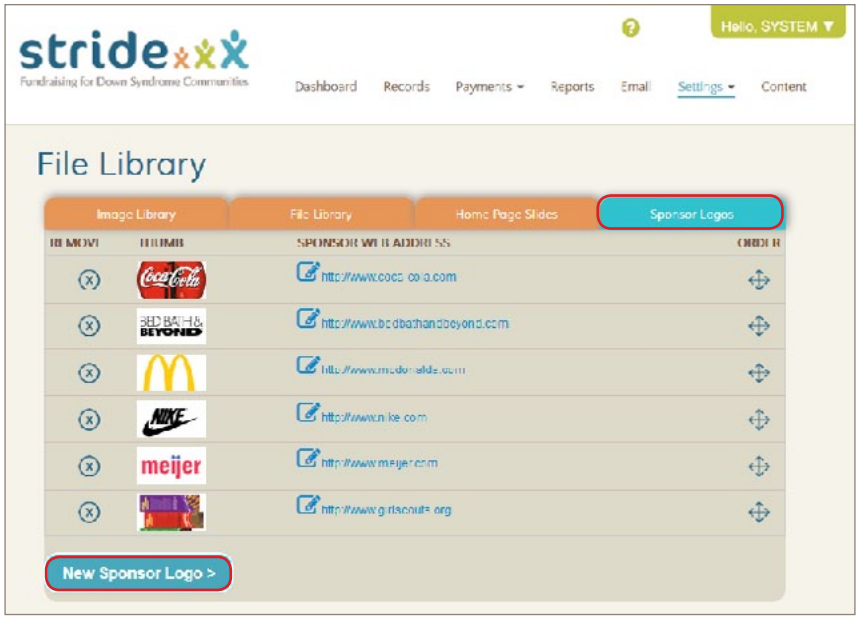


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

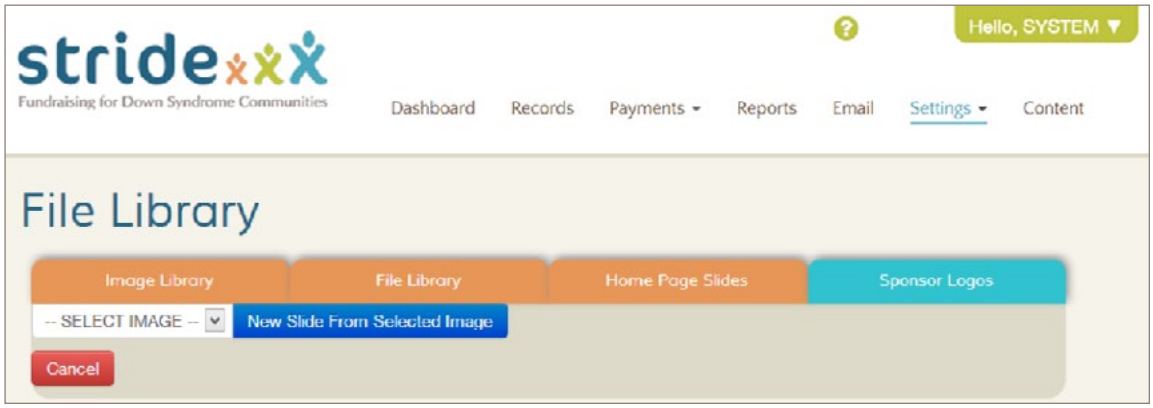
4. **Next, click the "Sponsor Logos" tab on the File Library page.**

5. **Click on the blue "New Sponsor Logo" button.**

The Sponsor Logos tab of the File Library page.

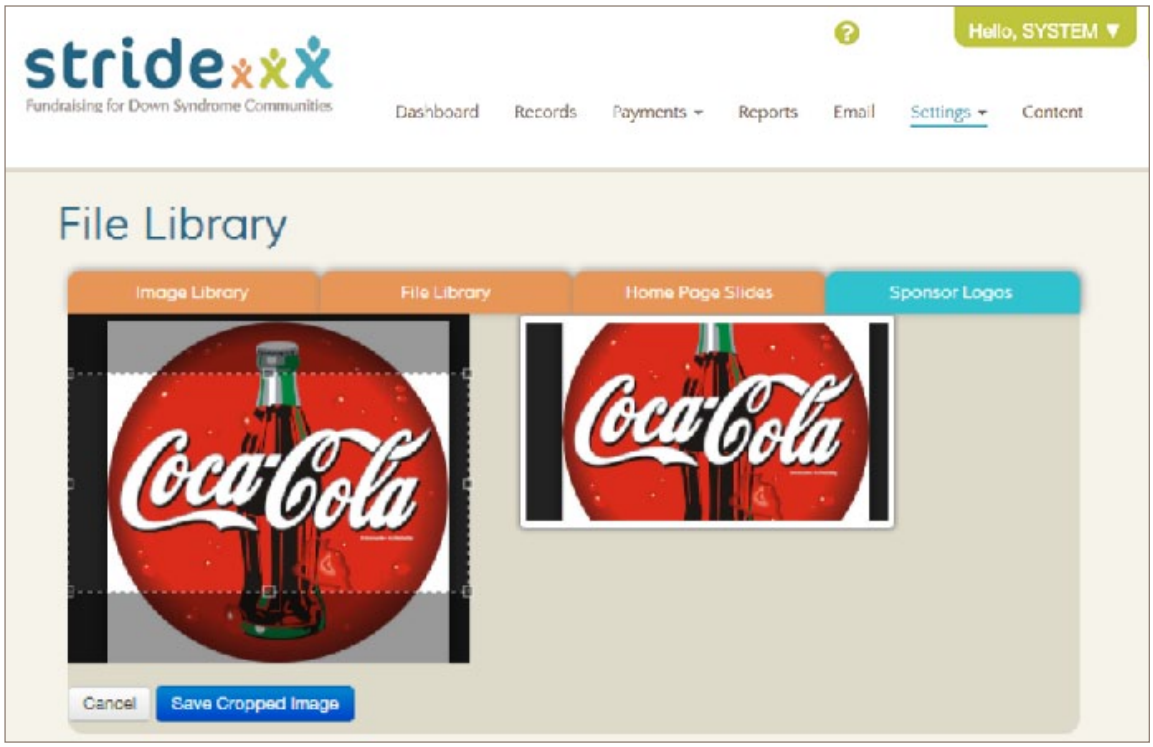


6. **Select the specific image you wish to use from the drop-down menu and then click "New Slide from Selected Image."**



7. **Drag the corners to expand the marquee box and crop the image, then click "Save Cropped Image."**

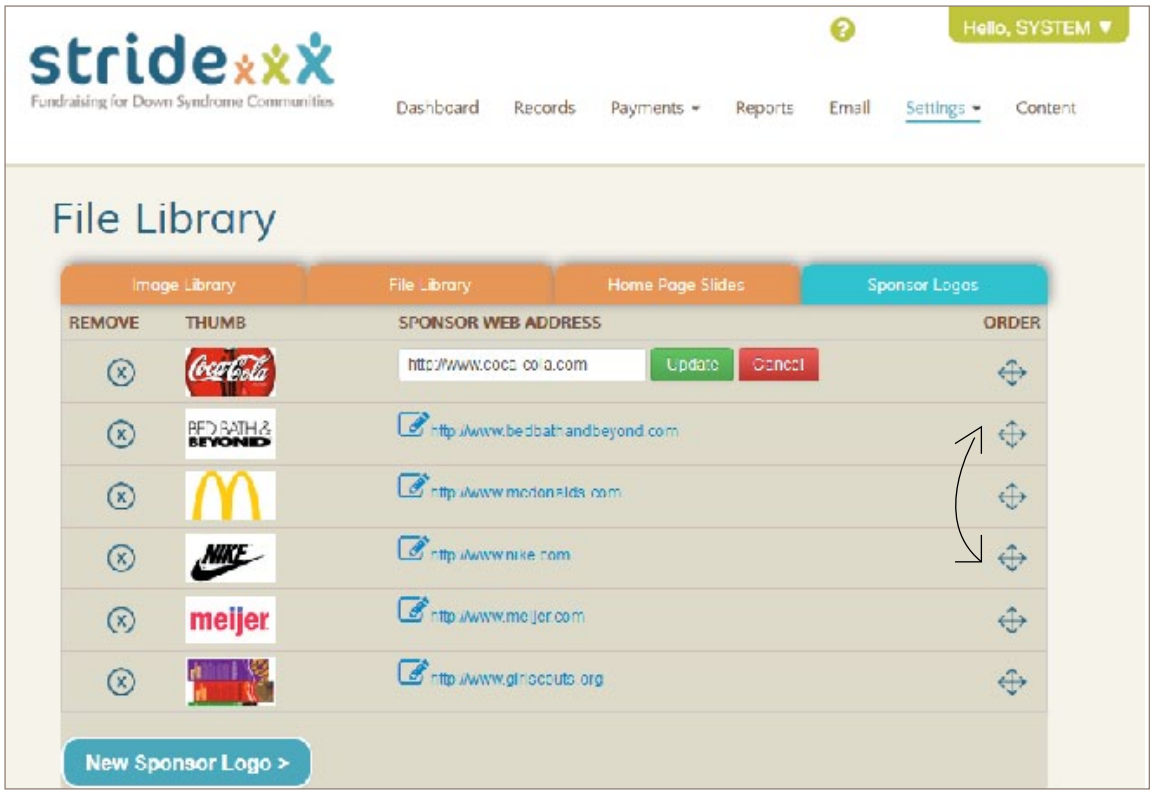
   This image will now appear in the Home Page Slides list. If part of the sponsor logo gets cut off because it doesn't fit the dimensions of the cropping box, see the FAQ for tips.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

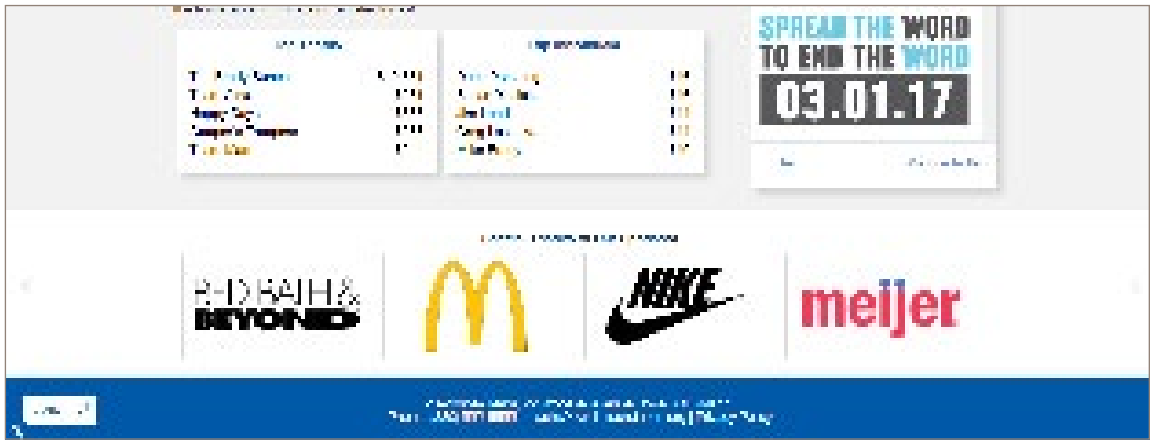
Once you have saved the cropped image, you can enter a URL in the "Sponsor Web Address" column, and arrange the logos however you want using the multi-directional arrow tool in the "Order" column. If you click the logo on the bottom of the public site, it will redirect you to the URL you have entered.

Adding a web address and re-arranging the sponsor logos.



The sponsor logos will appear at the bottom of the home page, in the order you specified.

The event home page, with sponsor logos at the bottom.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Updating text on the main fundraising page

You can update the text on the main page of the website throughout the fundraising season. For example, you can use it to notify visitors that online registration is closing. You can do this by changing the text default messaging on the main page. After online registration has closed, you may need to update the main page text default to indicate the following:

"Online registration has closed, but you can still register in person the day of the walk."

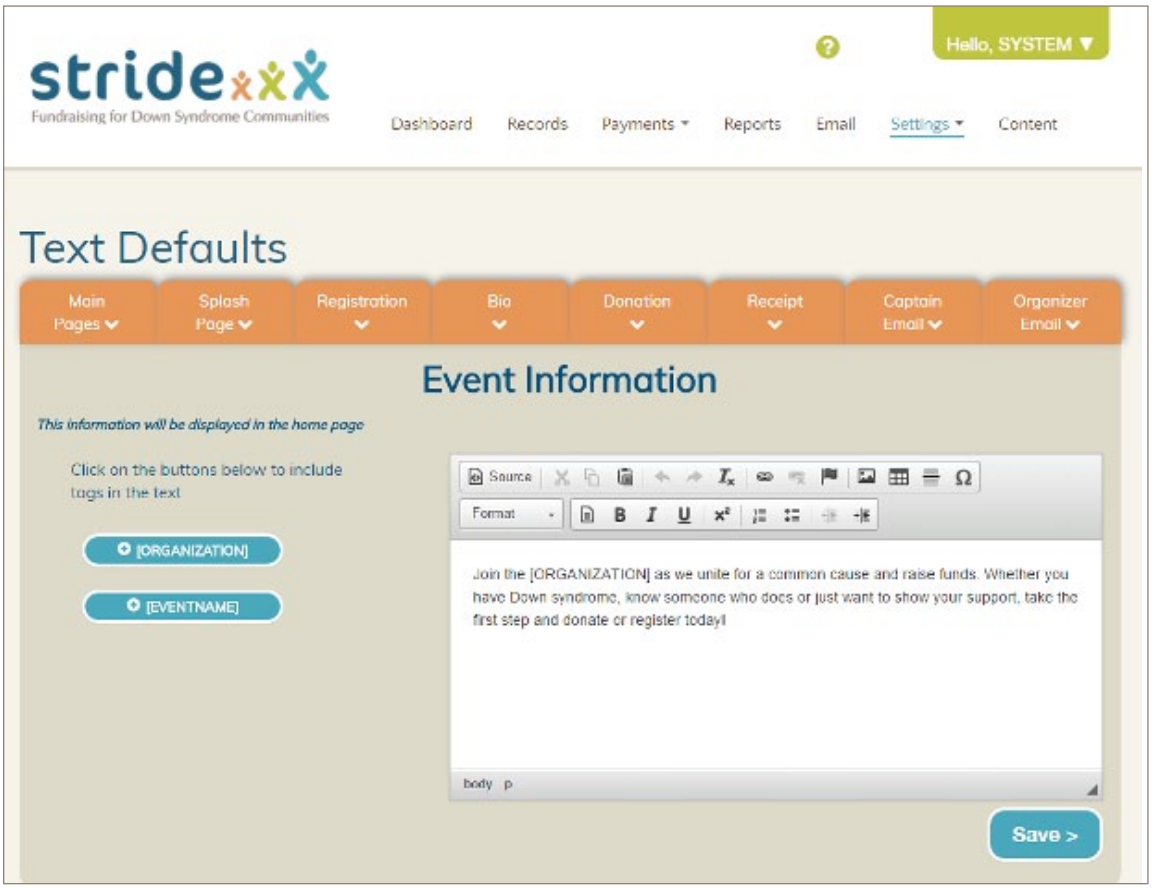
After your walk has ended and while the website is still open for donations, you can update the main page text default with a message such as:

"Thanks to everyone who supported us for the 2015 walk. We appreciate the donations of your time, talent, and both in-kind and monetary contributions!!!

We are still accepting online donations to continue our mission to promote awareness and advocacy, provide new parent packets, scholarships for classes and camps and social activities for the families. You can donate online, by selecting the blue DONATE button above. We appreciate your support!"

You may also want to notify registrants of deadlines regarding t-shirt size guarantee or cut-off date to receive a shirt.

To update the text on the main page, go to Settings > Text Defaults > Main Page. Click in the text box to edit the text. This works just like a word processor. Click Save when you're done.



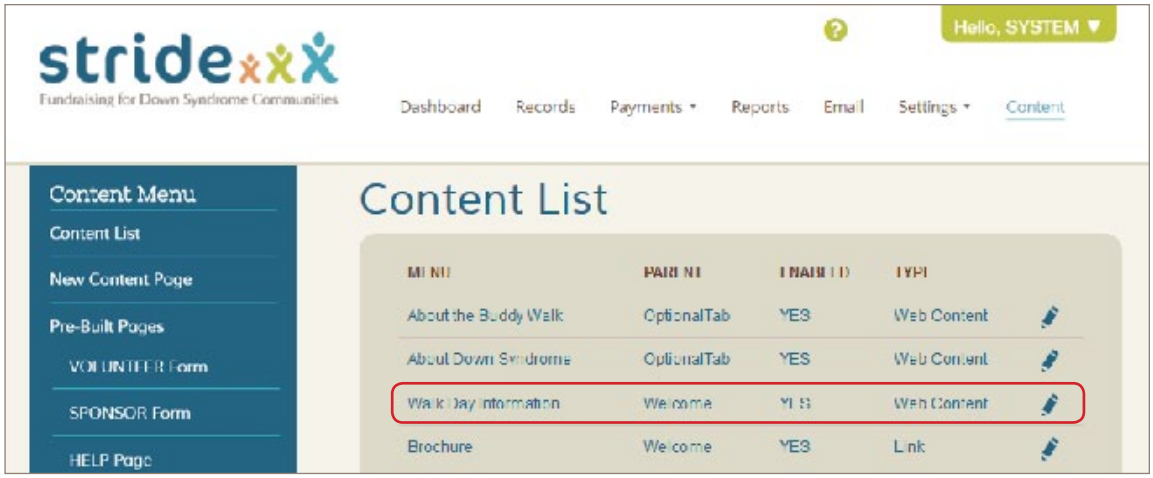
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Updating the Walk Day Information content

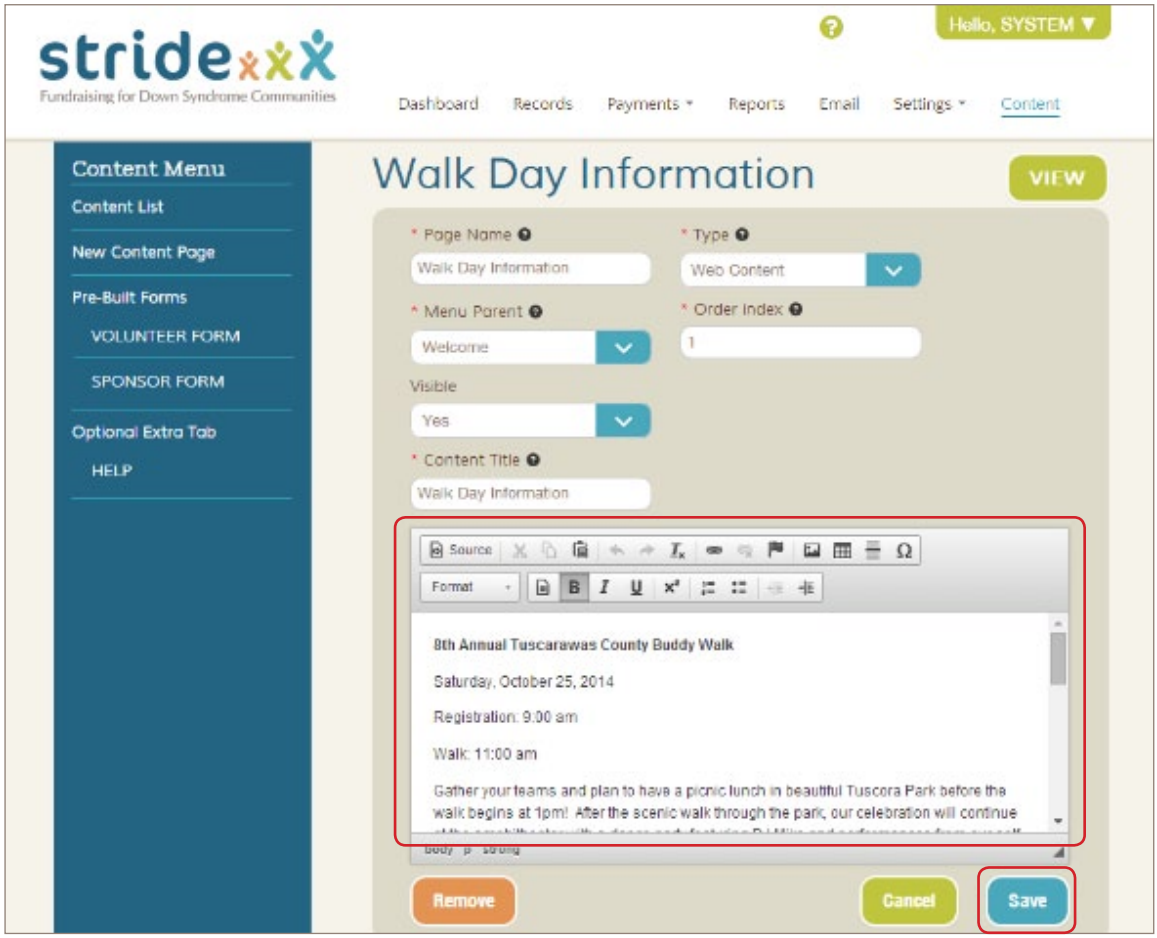
Ds-connex probably set up a Walk Day Information page for you when your site went live. This is where information like time, date, directions, and what to bring is posted. It is under the Welcome tab.

1. **To edit your Walk Day Information page, click "Content" from your dashboard. The Content List is a list of all the content you have created for your site.**
2. **To edit you Walk Day Information page, click the pencil icon to its right.**

The Content List shows only the custom content pages you have made.



3. **Next, either type the text you want in the text box, or paste the text from another source. You can edit the text much like you would in a word processor.**
4. **When you're done, click Save.**



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

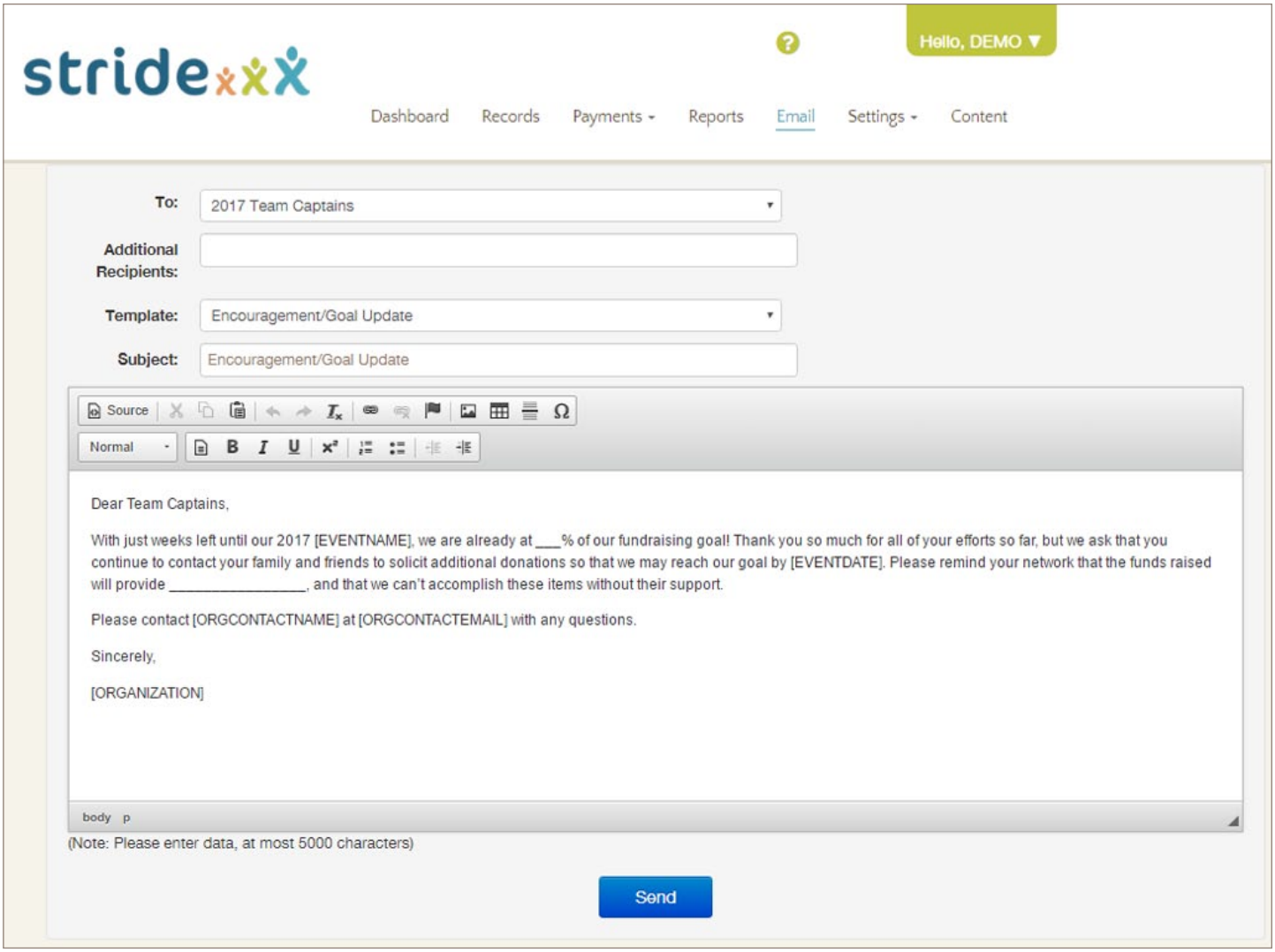
Walk Day Preparation

In this section, we'll discuss things you'll want to do in preparation for your event, from closing registration on your Stride site and changing the messaging on your main page to finding out how many T-shirts are needed per team.

Emailing Team Captains

Stride now allows you to email team captains from current and past event years using templates. You can modify the templates here or permanently in Settings > Text Defaults > Organizer Email. You can also enter your own text and email recipients.

To send an email, go to the Email tab. Then choose a recipient or enter recipients, and choose a template or enter your own email by using the drop-down and picking "Create your own email letter." Click Send when you're done.



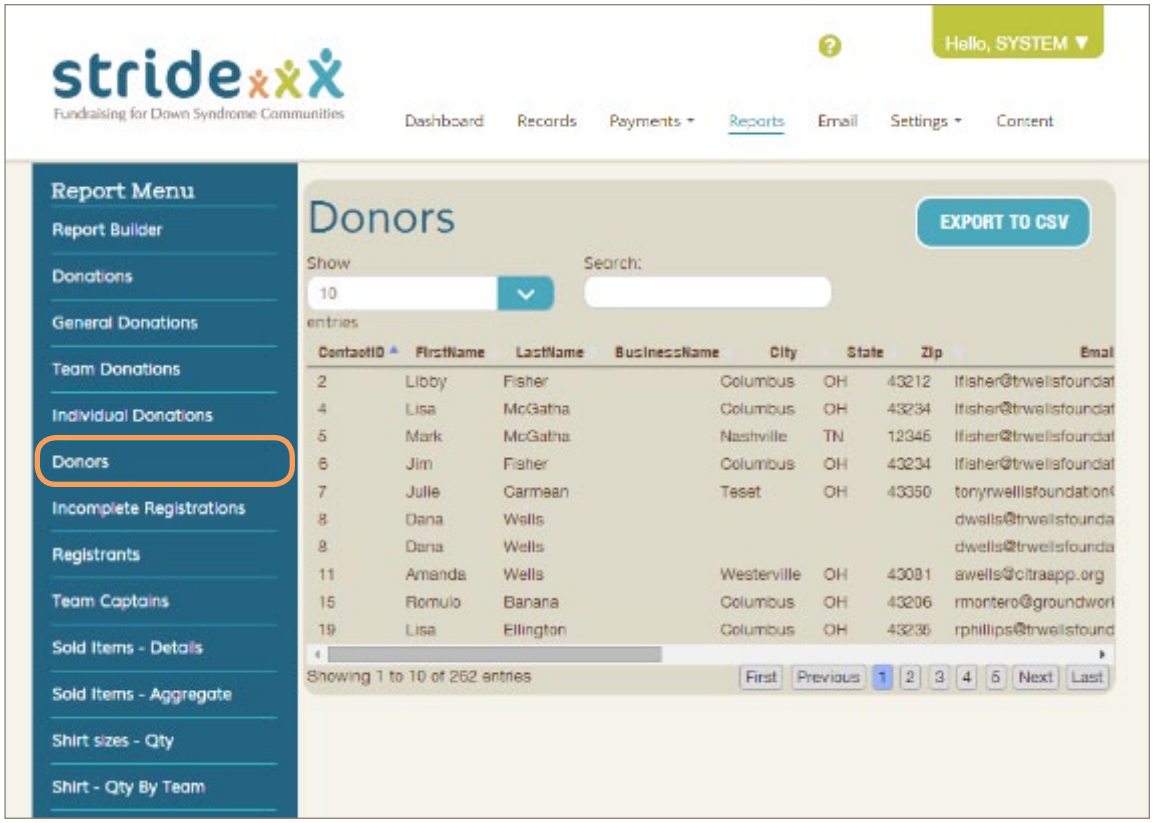
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Emailing all registrants or donors

Stride sends out automatic emails thanking donors and registrants. If you'd like to communicate further with registrants, donors, or any other category of user, you can find and export a list of their email addresses by going to Reports.

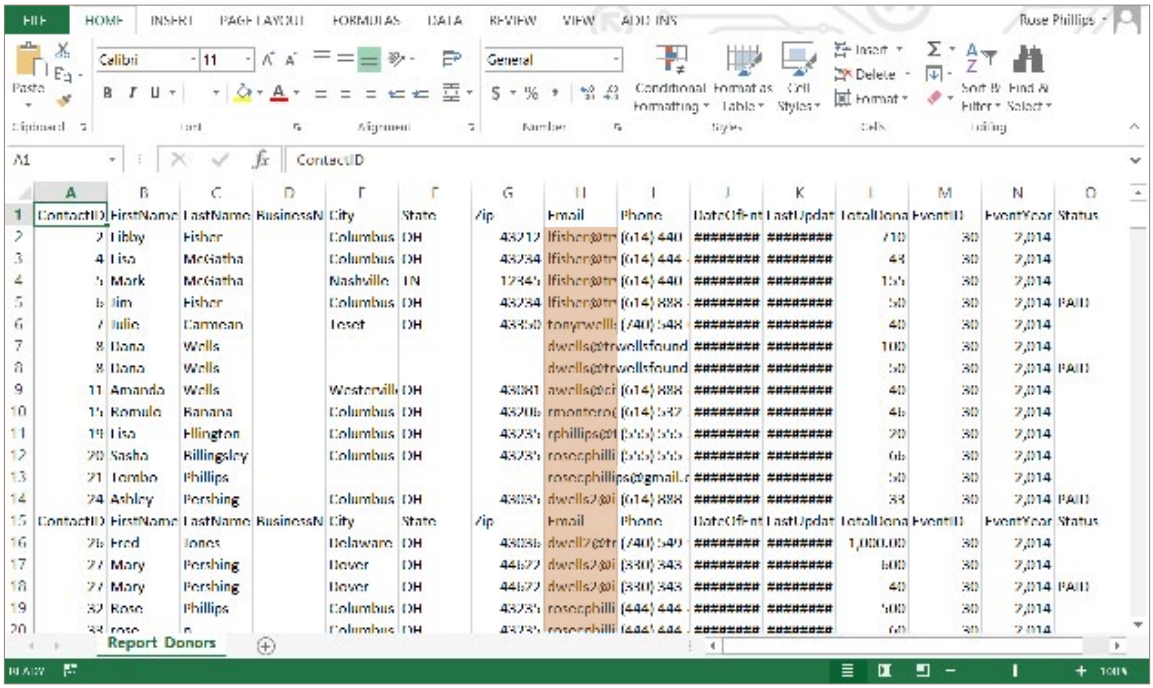
Next, select which group you'd like to email. In this example we'll pick donors, so we'll select the Donors button.

Click Export to CSV. Save the file, then open it. It will open in either Excel or Numbers, depending if you're using a PC or a Mac.



Next, click on the first email address under the Email column and drag downward until all of the email addresses are highlighted. Right click and copy the text.

Open a new email. Right click in the Recipient field and click Paste. Enter a subject and body text, then click Send.



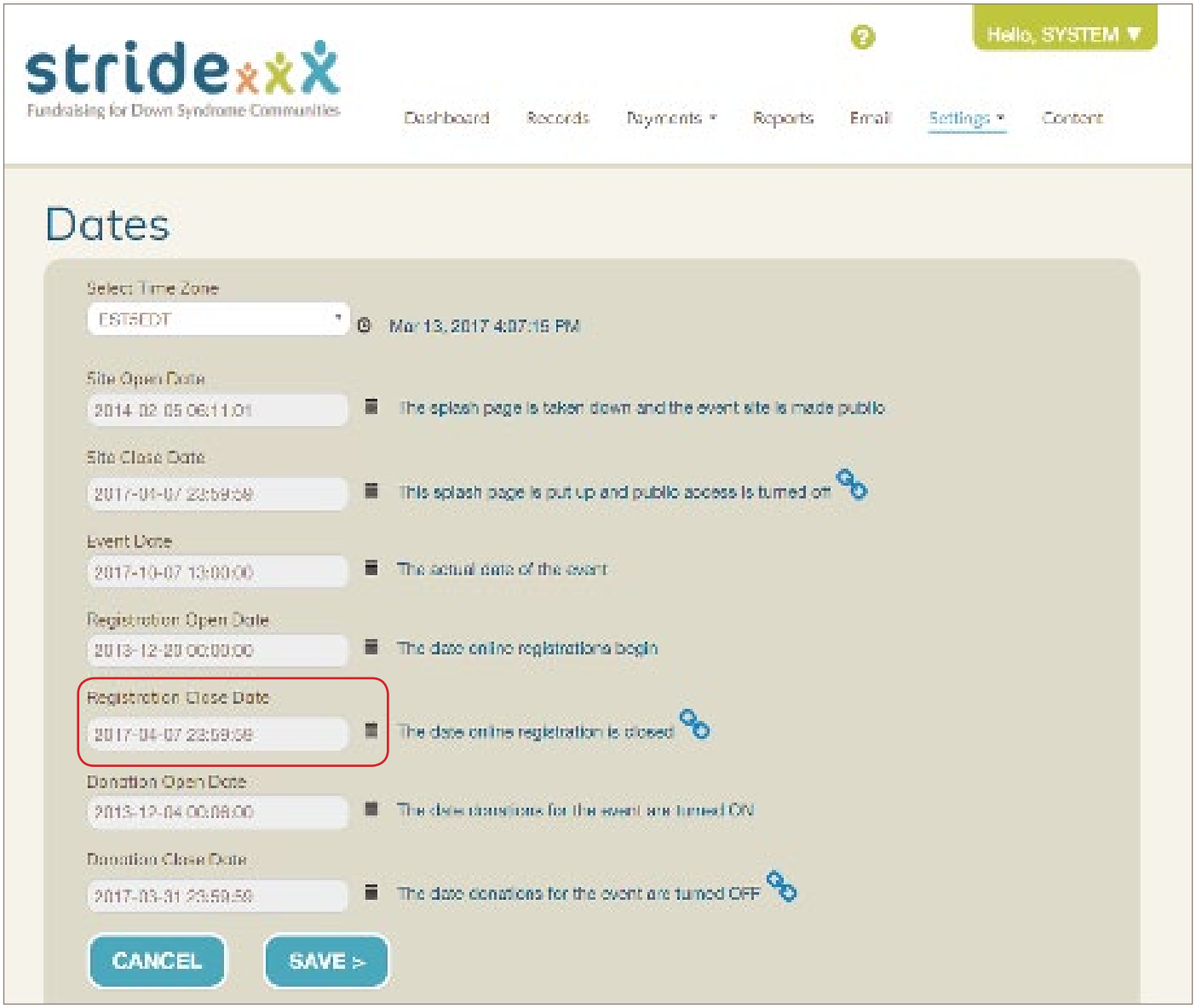
Highlighting the email addresses in Excel

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Closing Registration

Most event coordinators choose to close online registration in the days leading up to their event so they can prepare for the number of people signed up. Many of these coordinators offer day-of registration as an alternative for people who miss this window.

1. **To close registration for your event, go to Settings > Dates. Click the calendar icon or the text field to the left of Registration Close Date.**



The Dates page, populated with open and close dates.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

2. To select a date, use the arrows to scroll between months. Select the specific date on the calendar.

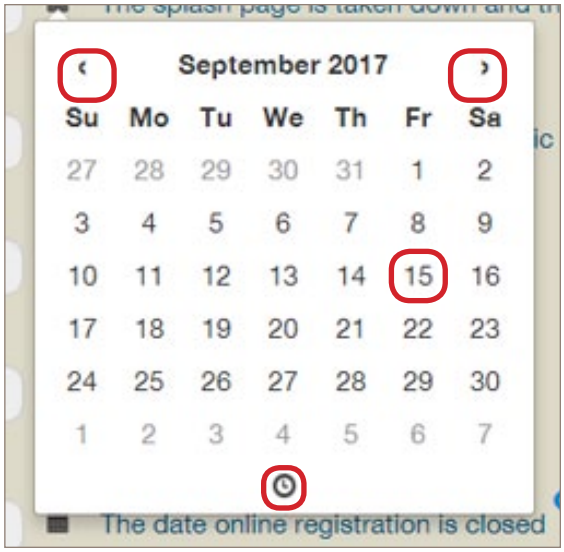
3. You can select an exact time for registration to close. This feature comes in handy when setting opening and closing dates on the website so you can tell attendees that registration closes at 8pm the night before your event, for example.

   To set an exact time, click the clock icon at the bottom of the calendar. Click the up and down arrows to increase or decrease the hours, minutes, and seconds. It is a 24-hour clock.

   Toggle back to calendar view by clicking the calendar button at the top of the clock.

4. When you're done setting the date and time of the event, click on the page outside of the box to close the pop-up. Then, click Save.

Choosing a date on the calendar.



The clock view.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Reviewing Team Captain pending payments

Check the pending team captain payments under the "Payments" tab to make sure that transactions are verified frequently so team captains receive proper recognition/incentives. See Approving pending team captain payments (pg. 20).

Reports available for walk day registration

You can access the REPORTS tab to create reports for use the day of the walk. The registrant report can be exported to a CSV file and sorted and printed as needed for the walk. Donor and t-shirt reports may also be useful for check-in.

The Stride team has created 3 additional walk day reports that can be requested by the event coordinators that are formatted for ease of use on the walk day. The three reports are as follows:

1. All registrants sorted in last name order. The report includes the following fields; last name, first name and t-shirt size.
2. All registrants sorted first by team and then last name. The report includes the following fields; team name, last name, first name and t-shirt size.
3. All Donors sorted by last name. The report includes the following fields; last name, first name and donation amount.

An example of these reports is attached. Please notify the ds-connex support team 3 business days prior to the walk if you would like to have these reports created for your walk.

Sample Registrants report.

Registrants Report		
Last Name	First Name	T-Shirt Size
Bancroft	April	Adult Small
Bancroft	Elias	Youth X-Small
Bancroft	Jon	Adult Medium
Bancroft	Jordan	Youth Medium
Bancroft	Kadin	Adult Small
Bancroft	Seth	Youth Small
Bank	Union	
Bordin	Anthony	Adult Large
Bordin	Eliana	Youth Medium
Bordin	Silvia	Adult Medium
Butler	Boomer	Adult X-Large
Butler	Brady	Youth Small
Butler	Bryan	Adult X-Large
Butler	Megan	Adult Small
Butler	Meredith	Youth X-Small
castro	lourdes	Youth Small
Christ	David	Adult Large

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Find the total number of shirts and items ordered

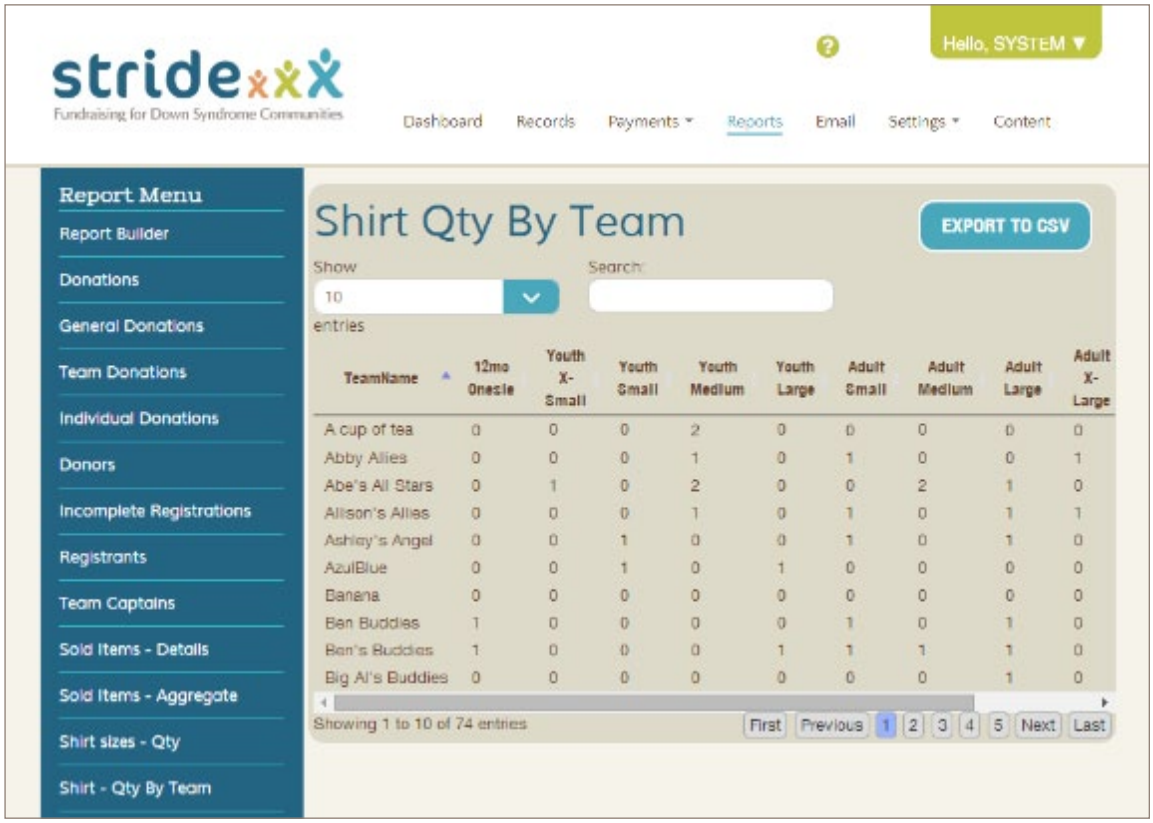
As the day of your event draws near, you may wish to get the total number of shirts or items that have been ordered in preparation. To find the items and shirts that have been ordered, go to Reports.

There are several types of reports for items and shirts. When making an order to a t-shirt or item vendor, you will likely want to use ***Sold Items - Aggregate*** and ***Shirt sizes - Qty***. These reports show the total number of each item or shirt size that has been ordered.

When distributing the shirts and items that have been ordered, you'll likely want to use ***Sold Items - Details*** and ***Shirt - Qty by Team***, which show which registrants purchased which items and how many of each shirt size go to each team captain. Many event coordinators establish a pickup time prior to the walk day to distribute shirts to team captains and individual registrants.

To access these forms, go to Reports, then choose the appropriate form, then click Export to CSV.

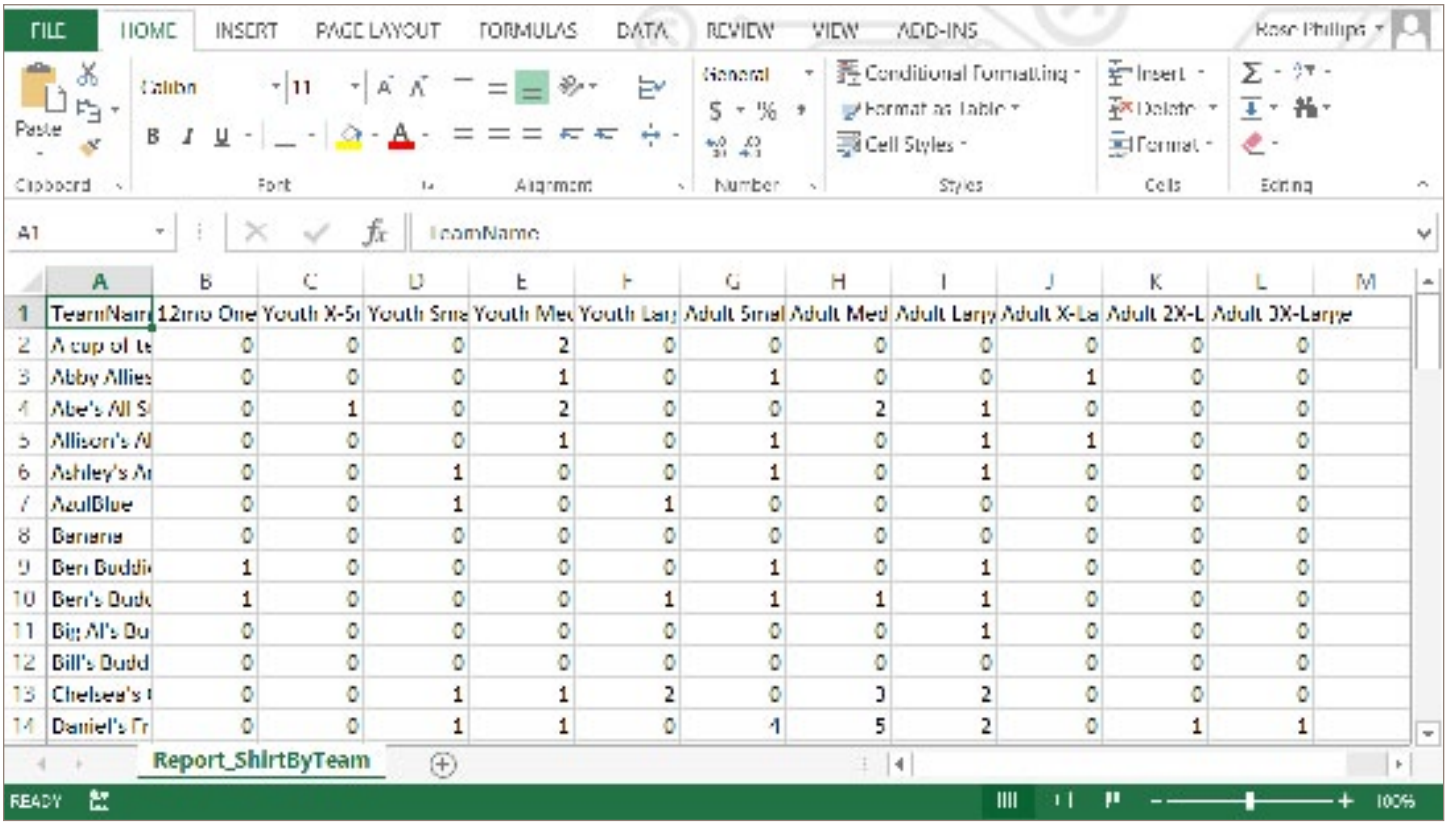
The Shirt Quantity by Team report helps you distribute shirts to team captains, who will then distribute them to their teams.



Continued on the next page.

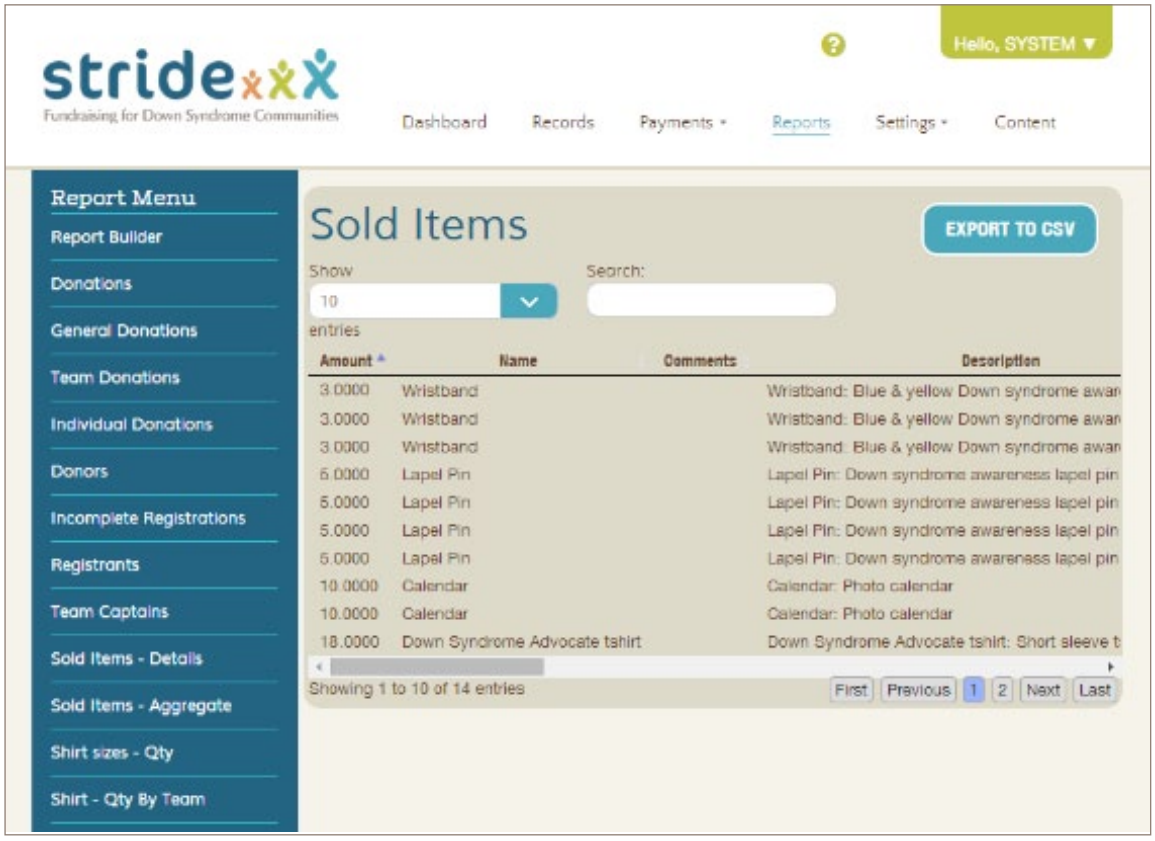
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Once you've saved and opened the report in Excel (PC) or Numbers (Mac), you can print it out or send it to your vendor.

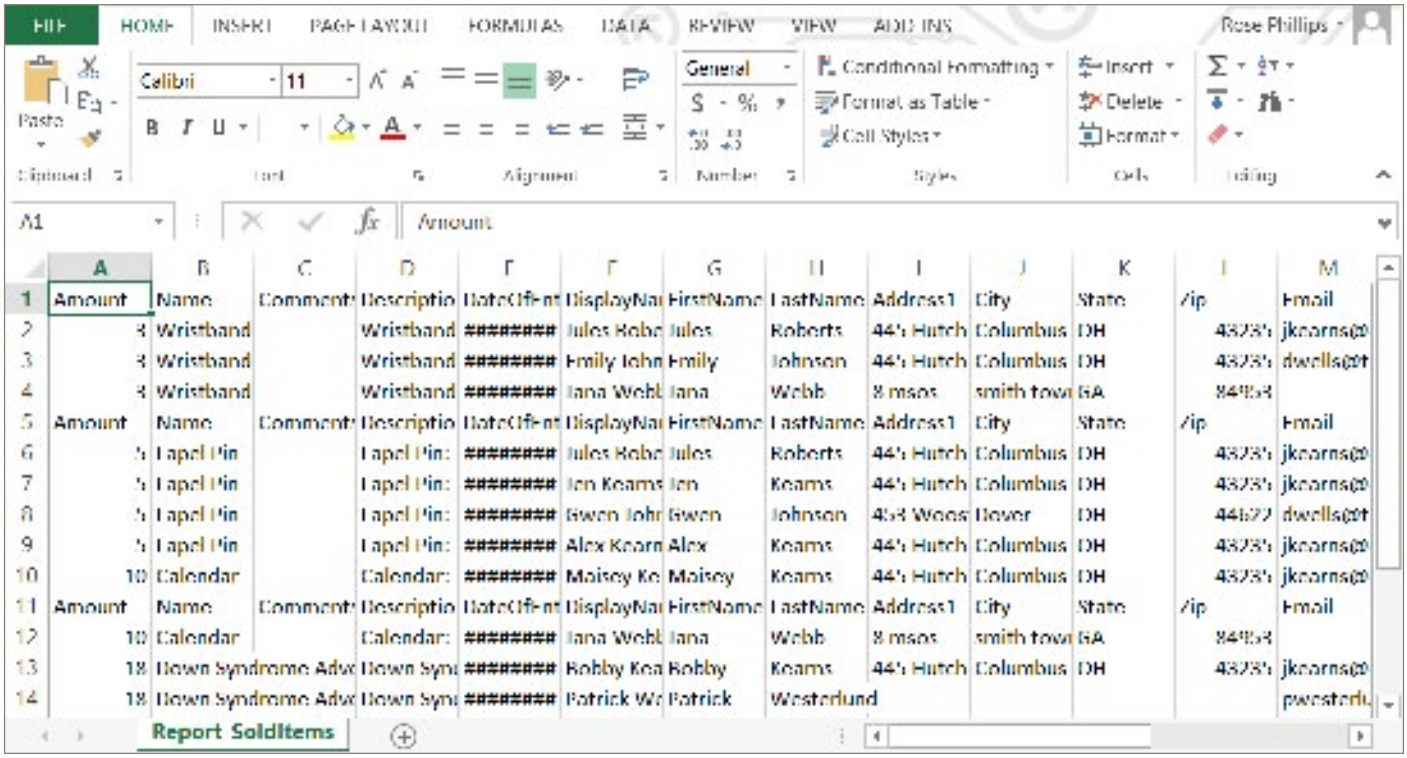


The Shirt Quantity by Team report open in Excel

The Sold Items- Details report shows who bought each item.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Amount	Name	Comment:	Descriptio	DateOffent	DisplayNa	FirstName	LastName	Address1	City	State	Zip	Email
2	3	Wristband		Wristband	########	Jules Robe	Jules	Roberts	44's Hutch	Columbus	OH	43235	jkearns@
3	3	Wristband		Wristband	########	Emily John	Emily	Johnson	44's Hutch	Columbus	OH	43235	dwells@t
4	3	Wristband		Wristband	########	Jana Webb	Jana	Webb	8 msos	smith town	GA	84153	
5	Amount	Name	Comment:	Descriptio	DateOffent	DisplayNa	FirstName	LastName	Address1	City	State	Zip	Email
6	5	Lapel Pin		Lapel Pin:	########	Jules Robe	Jules	Roberts	44's Hutch	Columbus	OH	43235	jkearns@
7	5	Lapel Pin		Lapel Pin:	########	Jen Kearns	Jen	Kearns	44's Hutch	Columbus	OH	43235	jkearns@
8	5	Lapel Pin		Lapel Pin:	########	Gwen John	Gwen	Johnson	453 Woos	Dover	OH	44622	dwells@t
9	5	Lapel Pin		Lapel Pin:	########	Alex Kearn	Alex	Kearns	44's Hutch	Columbus	OH	43235	jkearns@
10	10	Calendar		Calendar:	########	Maisey Ke	Maisey	Kearns	44's Hutch	Columbus	OH	43235	jkearns@
11	Amount	Name	Comment:	Descriptio	DateOffent	DisplayNa	FirstName	LastName	Address1	City	State	Zip	Email
12	10	Calendar		Calendar:	########	Jana Webb	Jana	Webb	8 msos	smith town	GA	84153	
13	18	Down Syndrome Advo		Down Syn	########	Bobby Kea	Bobby	Kearns	44's Hutch	Columbus	OH	43235	jkearns@
14	18	Down Syndrome Advo		Down Syn	########	Patrick We	Patrick	Westerlund					pwesterlu

Above: The Sold Items - Details report as shown in Excel.

General Tips

- Correspond with Team Captains to share important Walk Day Info and ask that they share this info with their team members.
- Confirm volunteers, performers, food vendors, special guests, and in-kind donations.
- Remind Team Captains of upcoming fundraising deadlines at least two weeks in advance (especially if incentives are offered).
- Announce t-shirt pick up protocol (date, place, alternative pick up options) at least two weeks in advance.
- Leverage social media outlets to begin reminding community of t-shirt/online registration dates and walk day info.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

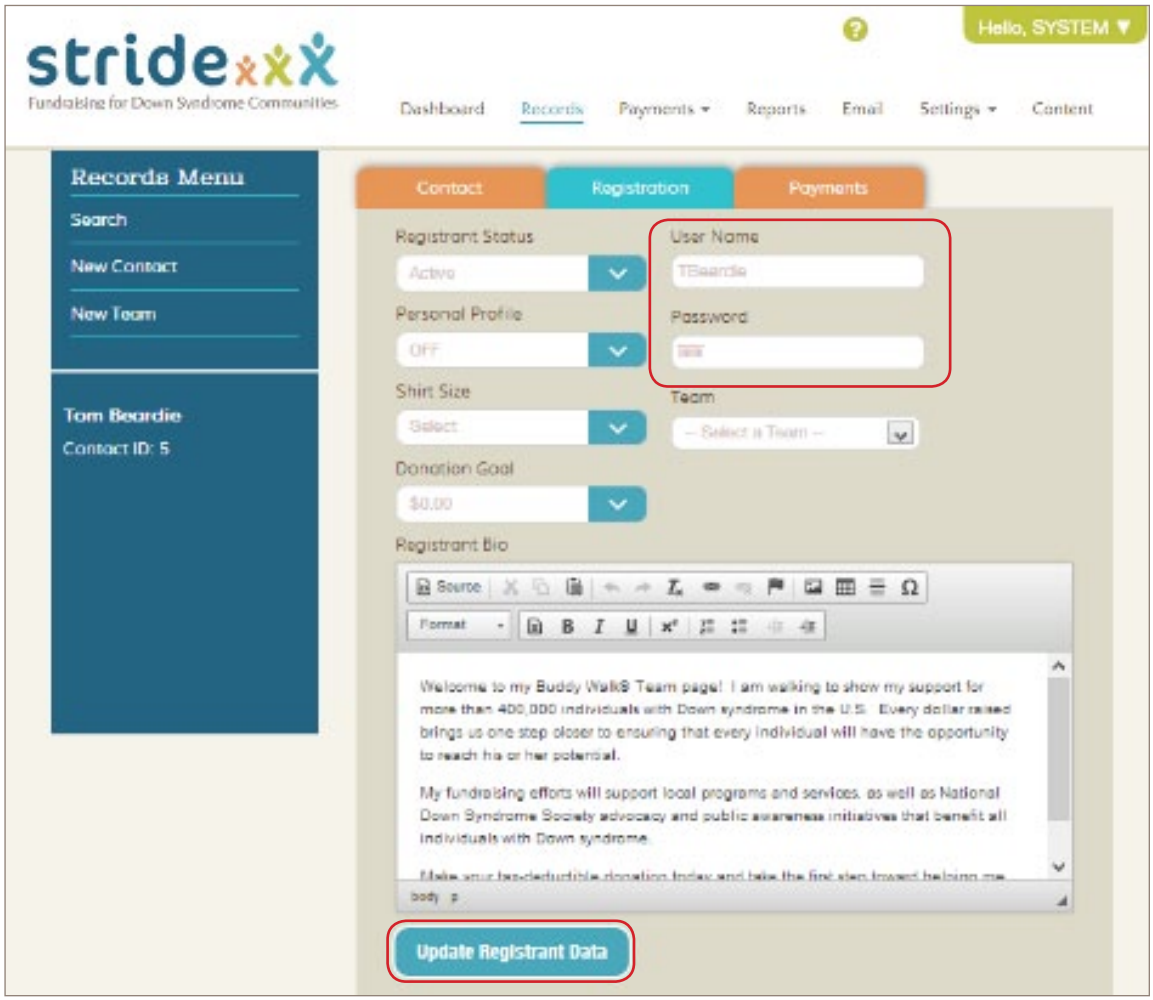
FAQ

Where can I find and change a user's lost username or password?

If a user accidentally deleted the email with their registration information, you can find out their username and give them a new password in the administrative side of Stride just by knowing their name. First, go to the Records tab. Then, search for a person by name to bring up their account. Next, click the Registration tab.

From here you can enter a new password or new username. You can send this information to the registrant who has lost theirs or you can reset it to a new username and password. Click Update Registrant Data when you're done.

Editing an individual's registration information.



Can registrants change their own username and password?

Yes, they can do so by signing in and going to their profile page. Next, they should select "Login" and hit enter. They can then change your user name and/or password.

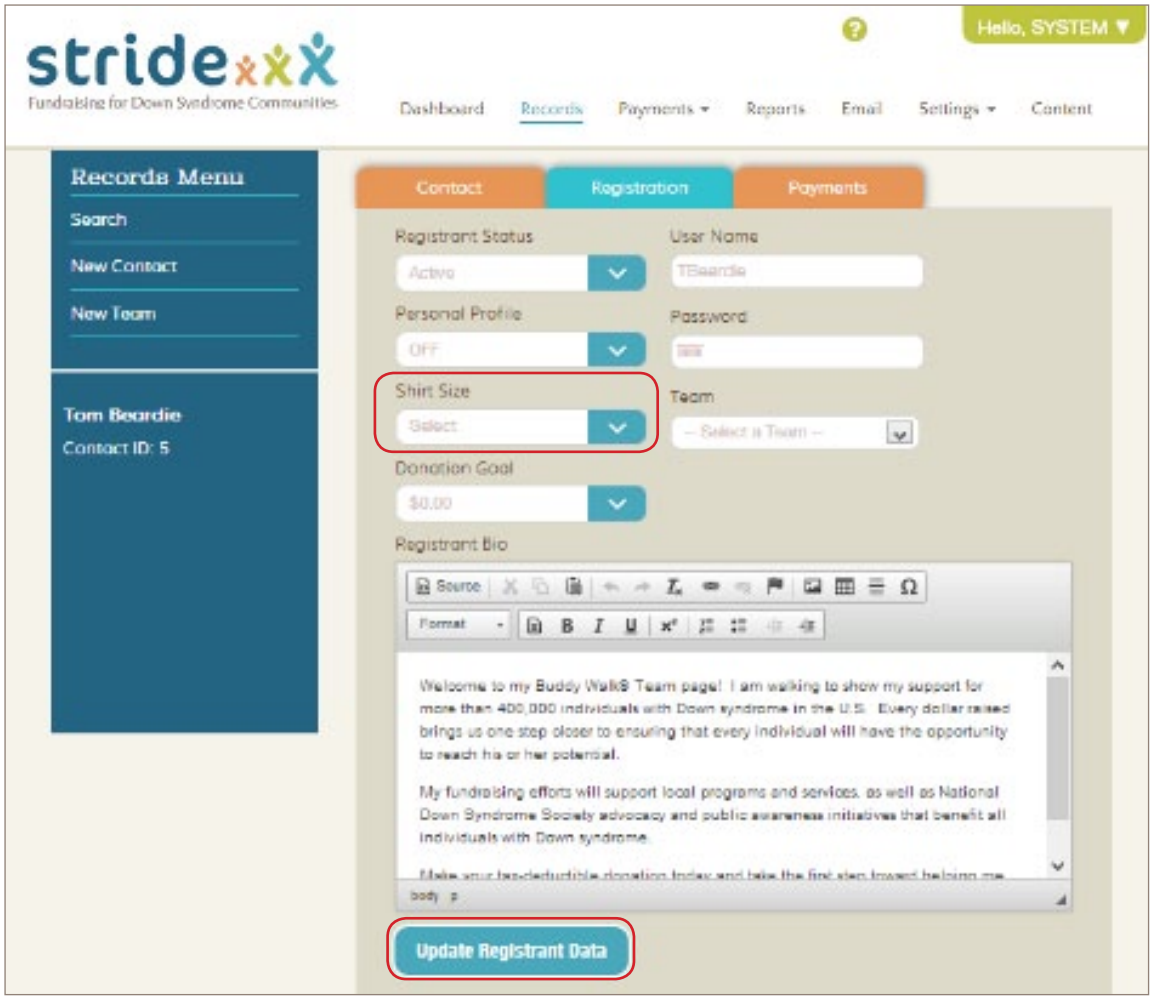
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

How can I change a user's shirt size?

If a user accidentally picked the wrong shirt size during registration, you can correct their mistake simply by knowing their name.

1. **First, go to the Records tab.**
2. **Search for a person by name to bring up their account.**
3. **Next, click the Registration tab.**
4. **Use the Shirt Size drop-down menu to choose a new shirt size.**
5. **Click Save Registrant Data when you're done.**

Editing an individual's registration information.



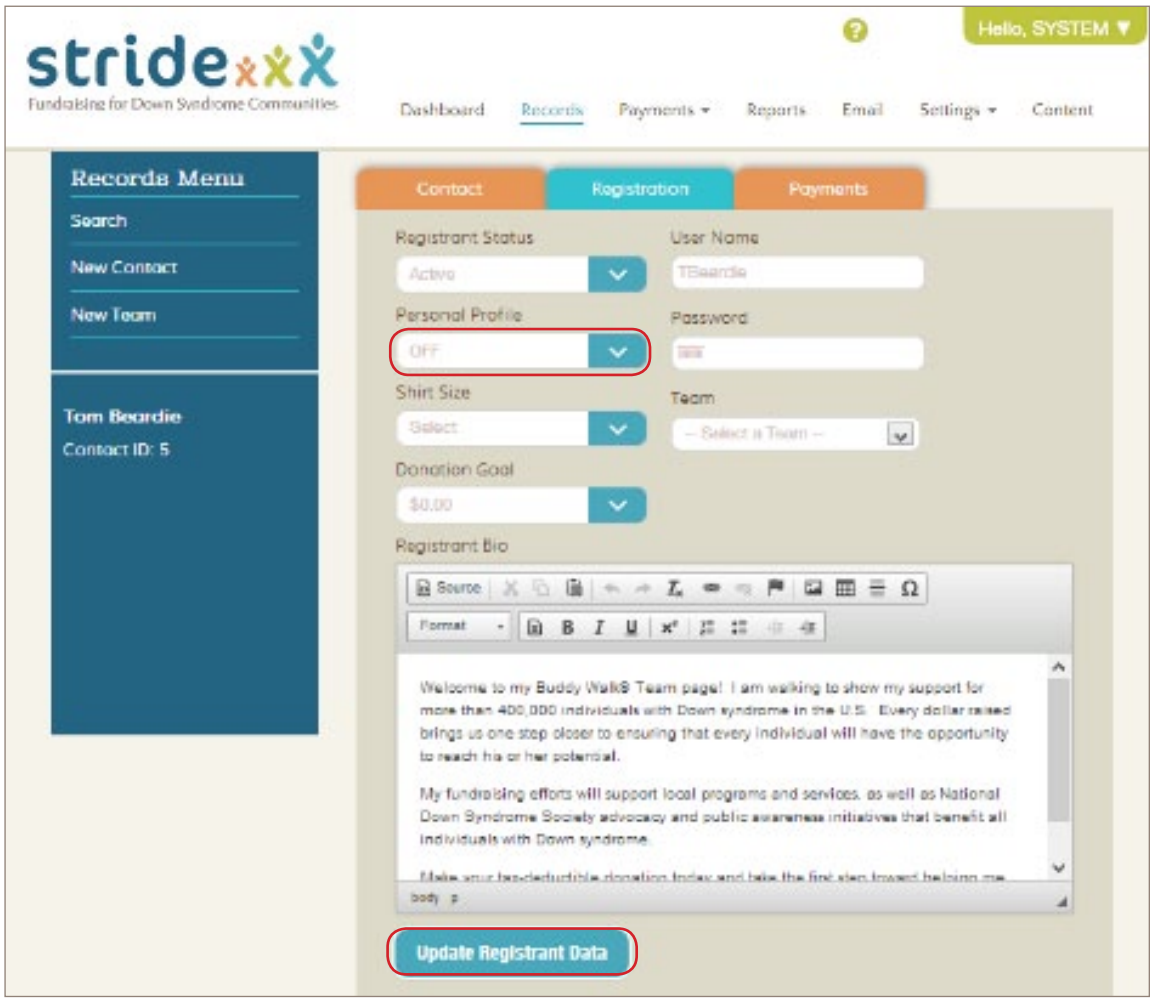
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

How can I make an individual's profile invisible so visitors are redirected to their team page instead?

A user may wish to turn their personal profile off so that when visitors search for them and click their name, they will be redirected to their team's page. That way, all funds donated in their name will go toward helping their team. Users can also do this from the public side of the site.

1. **First, search for a person by name to bring up their account.**
2. **Click the Registration tab.**
3. **Use the drop-down menu next to "Personal Profile" and turn it from On to Off.**
4. **Click Update Registrant Data.**

Editing an individual's registration information.



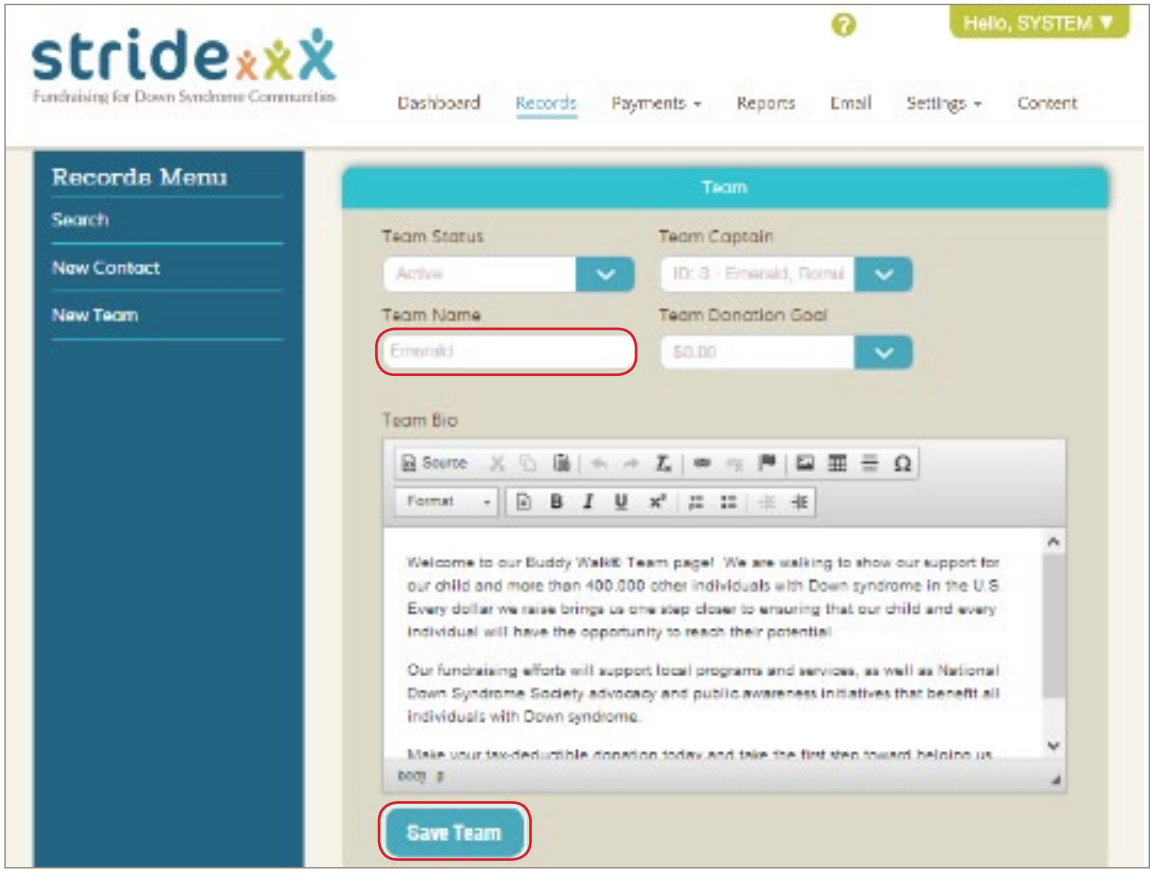
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

How can I edit a team name or change the team captain?

To edit a team's name or captain, pull up the team by searching for it under Records.

Edit the team name by editing the "Team Name" field. Change the team captain by using the "Team Captain" drop-down menu to choose from all registrants. Click Save Team when you're done.

Editing a team account.



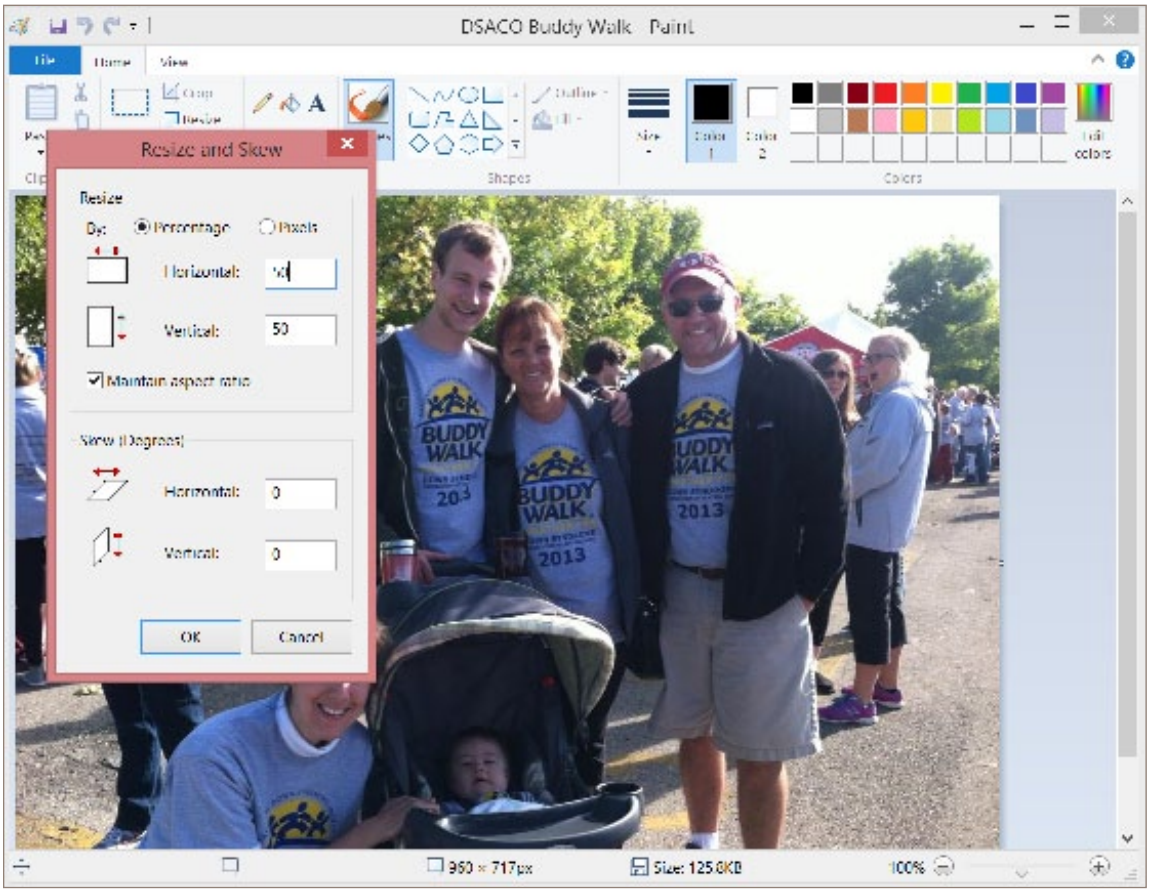
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

How do I shrink the file size of an image that's too large to load into Stride?

If an image does not load quickly into the front page slides or profile photos section of Stride, the file size of the photo may be too large. You can look at the file size by right-clicking on the image file on your computer and selecting the last drop-down option called "Properties." The size should be less than 2 MB or any number followed by KB. To shrink an image, see below.

Reducing Photo Size (PC)

Right click on the image in your file browser. Click Open with > Paint. Under Image, click Resize. Make sure the "Maintain Aspect Ratio" box is checked. Enter a new percentage under Horizontal. If the image is exceptionally large, enter a smaller number, like 25. Then, click OK. Next, save the image under a new name so that you can keep your original image for other uses. Your image should now upload more quickly.



Reducing Photo Size (Mac)

Right click on the image in Finder. Click Open with > Preview. In Preview, click Tools > Adjust Size. Make sure "Scale Proportionately" and "Resample Image" are selected. Enter a new, smaller number for the width and click OK. Next, save the image under a new name so that you can keep your original image for other uses.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

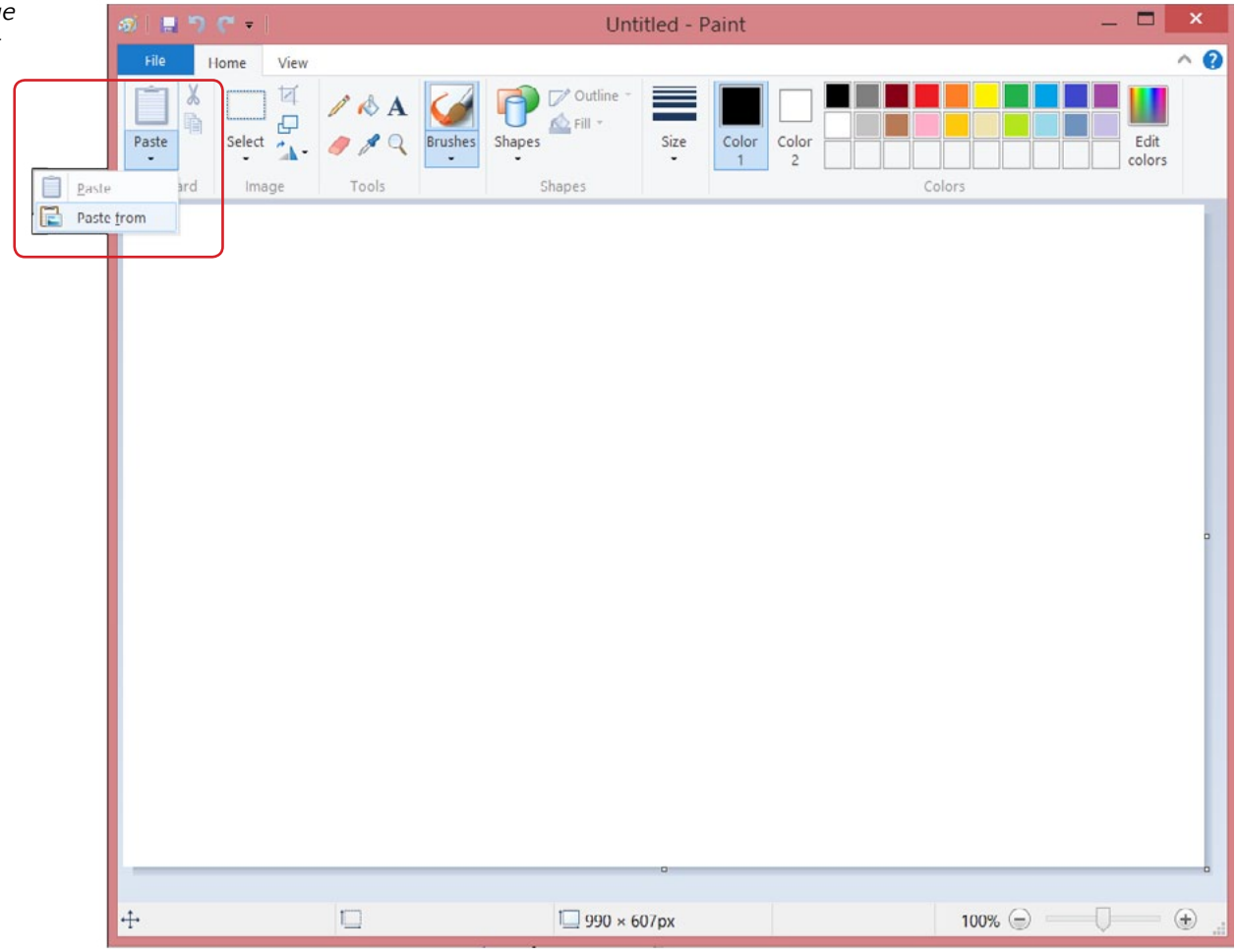
Part of the sponsor logo is getting cut off. How can I make it fit?

Often, sponsors will send you their logos over in a size that doesn't fit the sponsor logo box, so parts of the logo end up getting cut off. Sometimes sponsors also send over their logos in a format like PDF. The actual size of the sponsor logo doesn't matter so much as its height-width ratio. The sponsor logo spaces at the bottom of your Stride site are 275 pixels wide and 172 pixels high. You can simply add white space around any logos that are too long or too high, then use the marquee box tool that appears when you go to add a new sponsor logo to the sliders. This section will discuss how to size them appropriately using Microsoft Paint (default software for PC) and Preview (default software for Mac). If you'd prefer, the Stride team can also edit the logos for you.

Editing a Sponsor Logo in Paint (PC)

Save the image on your computer, then open Paint by searching for it in your computer's programs. A new blank page will appear. Click Paste > Paste From, then select the image file you want to use (JPEG, PNG, GIF formats only).

Pasting an image into a new Paint document.

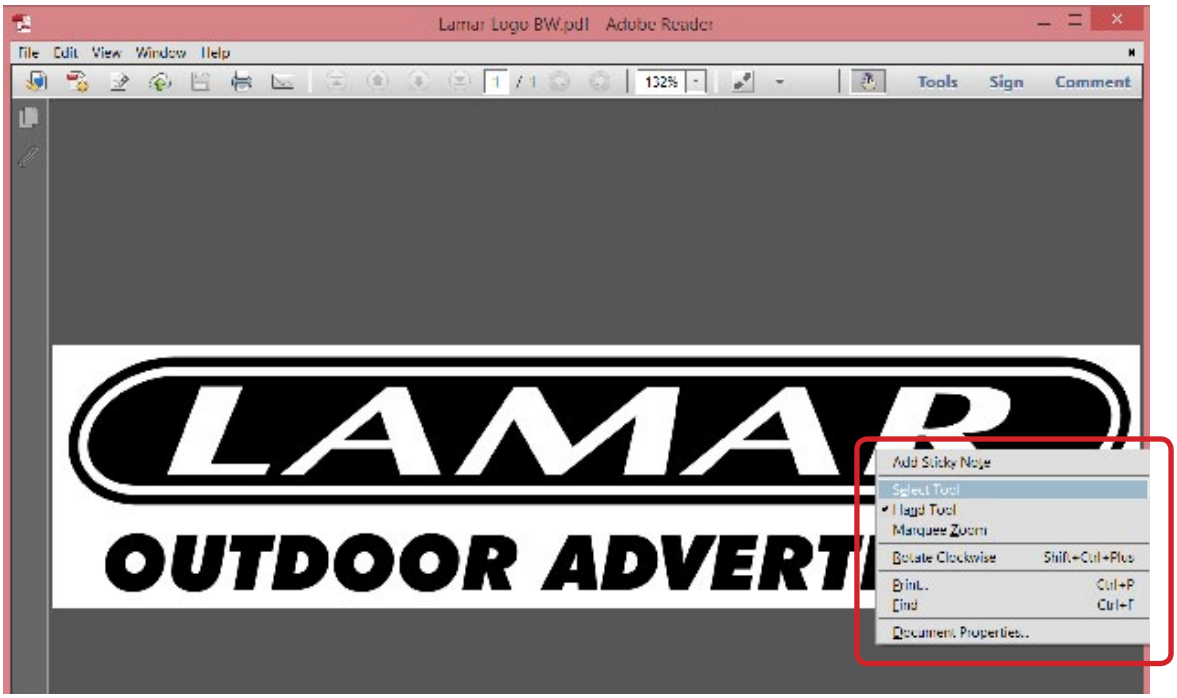


 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

If the logo is in PDF form instead of JPEG, PNG, or Gif, open the PDF in Adobe Reader (default Windows PDF app). If not, skip this page.

Select the image. Depending on your version of Adobe Reader, you can select the image by right clicking on it and selecting "Select Tool" instead of the default, "Hand Tool."

Switching to the "select tool" so we can select and then copy the image.



Click or double-click on the image until it turns blue (it's now selected)

Right click on the blue image, click Copy Image.

Next, open Paint again, right click, and paste the image onto the blank screen.

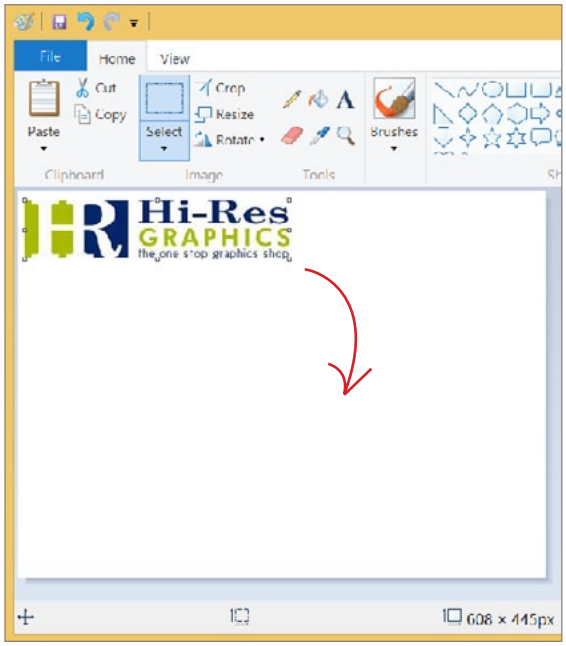
Copying the selected image.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

The image will be pasted onto the screen, but it will probably still be too wide to fit in the Sponsor Logos box. Don't click on anything except the image to keep it selected! If you un-select it, you will have to drag a box around it using the cursor to re-select it.

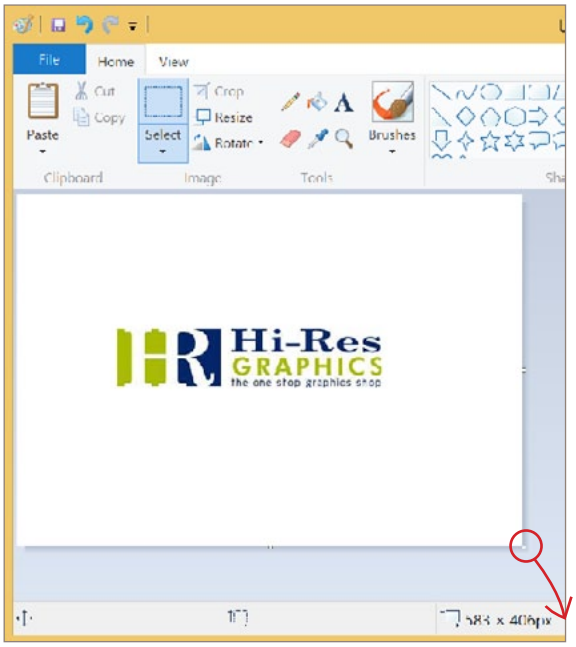
If the image is now small enough so it doesn't take up much white space in the document, simply drag it into the middle of the white space.

You can also expand the white space by clicking outside the box to deselect the logo and dragging the corners of the white area outward. You want there to be enough white space around the logo so you can upload it to the site and use the marquee tool to crop out the excess. Don't worry about the actual sizing, just leave about as much white space as shown below to the right. Go to File > Save.



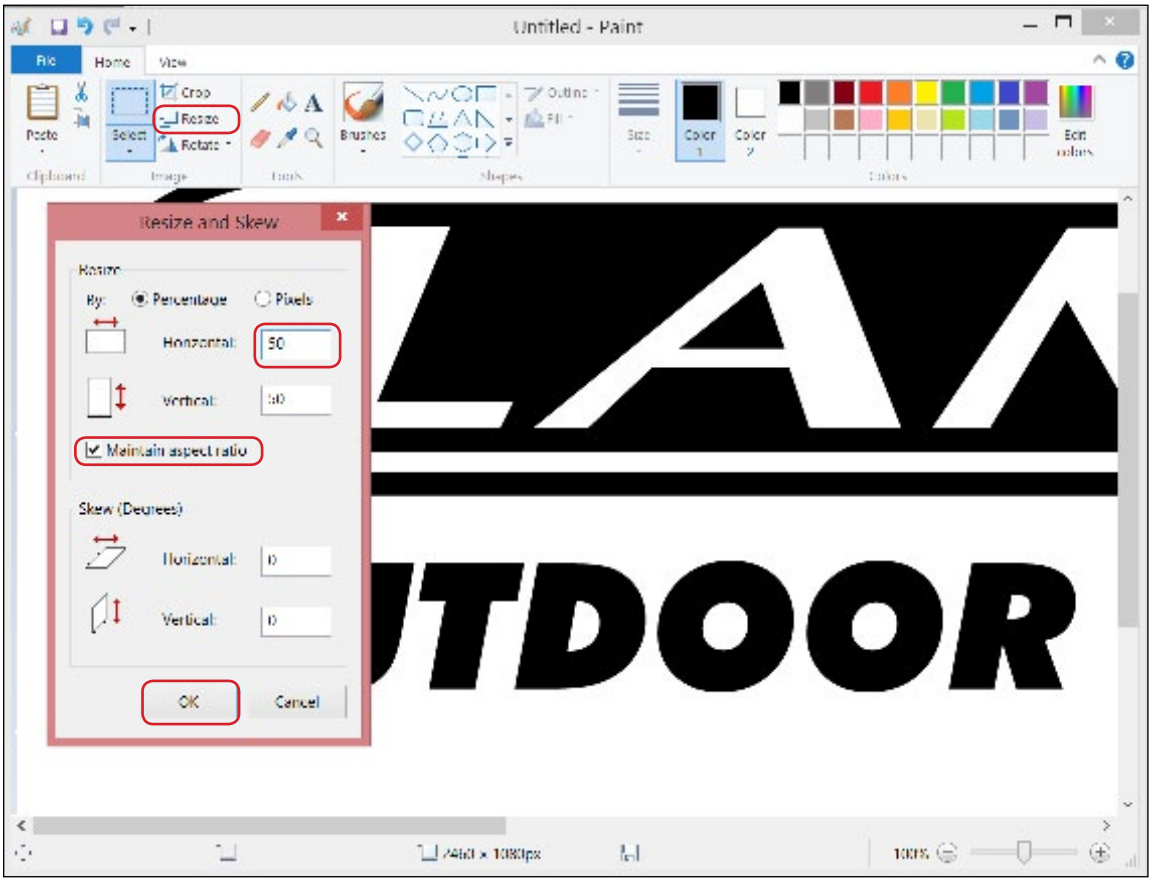
Left: Moving the logo to the center of the white space.

Right: Expanding the white space.



If the image is giant, you'll need to resize it. Make sure it's selected; if not, draw a box around it. Click Resize. Enter a number less than 100 in the Horizontal box (keeping the Maintain Aspect Ratio box checked). I chose 50. Click OK. This makes the logo smaller inside the white space, but if I'm not sure if it's small enough, I'll repeat this step.

Then, be sure to save the image by going to File > Save.



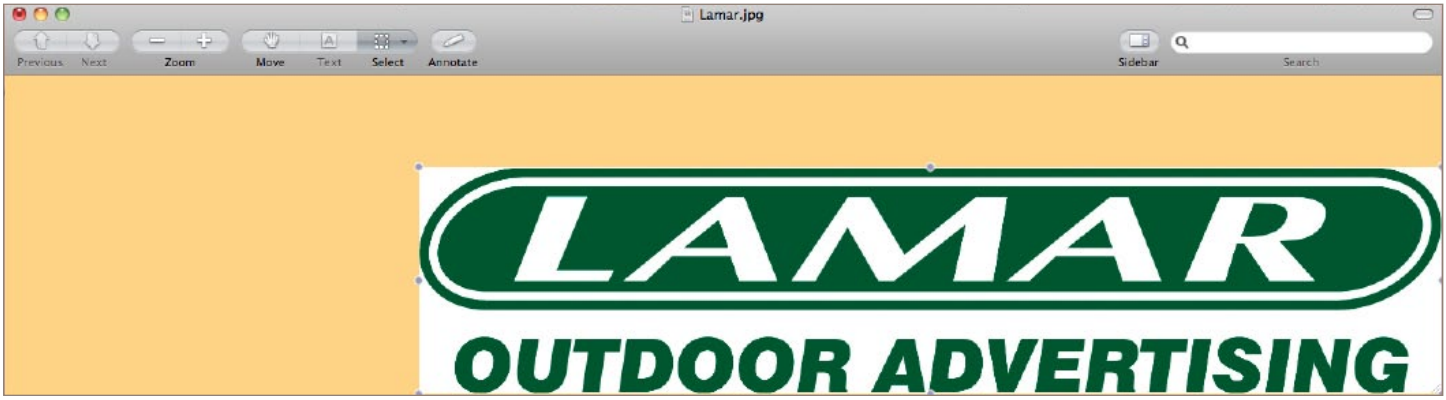
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Editing a Sponsor Logo in Preview (Mac)

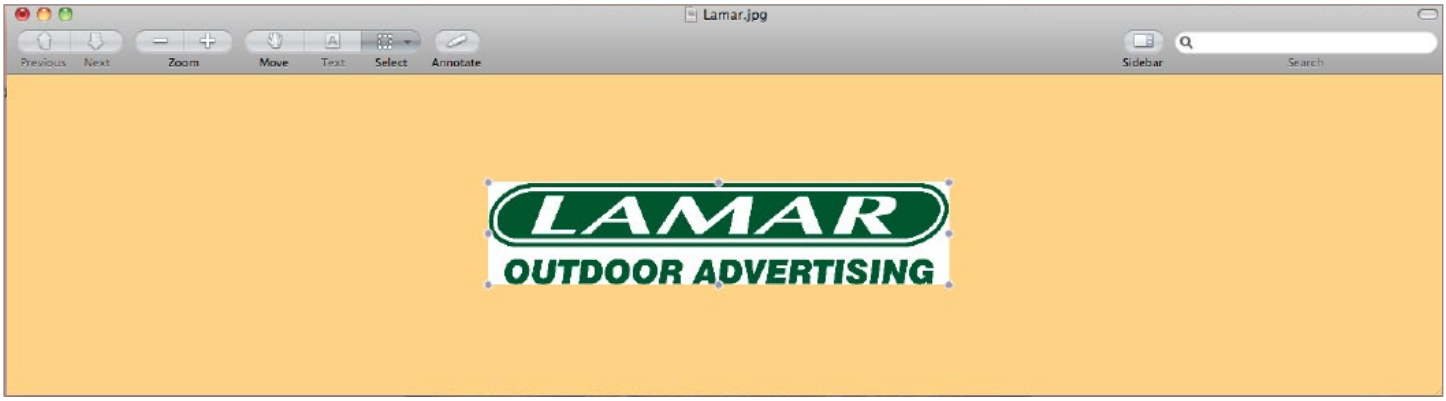
Open the image in Preview (default).

Use Command + A to select the whole image, then Command + C to copy it to your clipboard. Then, click delete while the image is still highlighted.

Hit Command + V to paste the image onto the newly blank background. Then, click and drag one of the corners inward while holding the SHIFT key to shrink the image while keeping its original proportions.



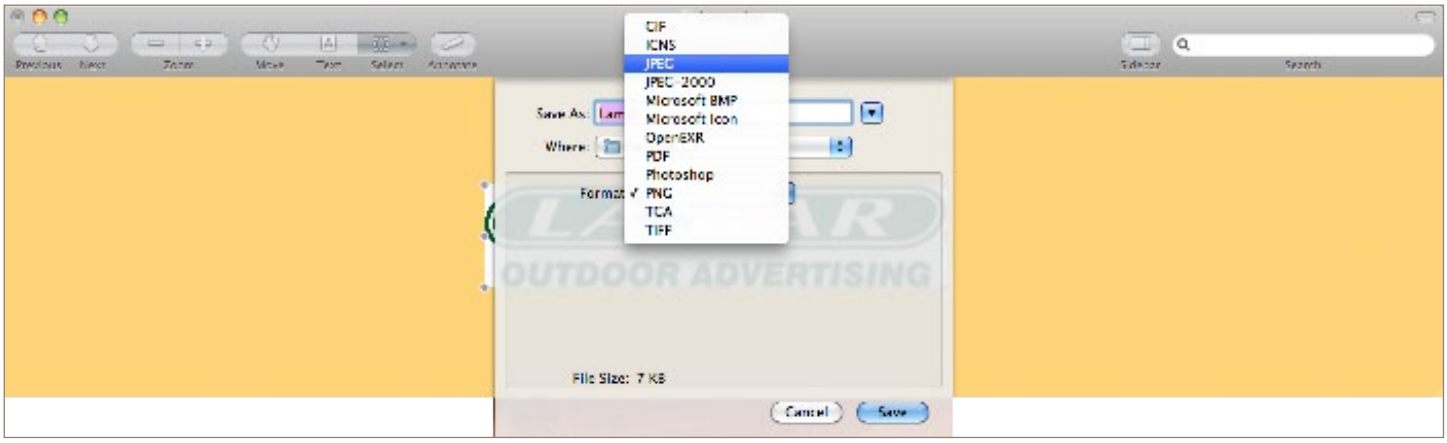
Shrink the image until there is a significant amount of blank space above and below it. The exact amount doesn't matter, as long as it can fit in a box with the same width x height ratio as 275 x 172 pixels, since you will be able to crop it down in Stride. Then, click and drag the image to the center of the blank space.



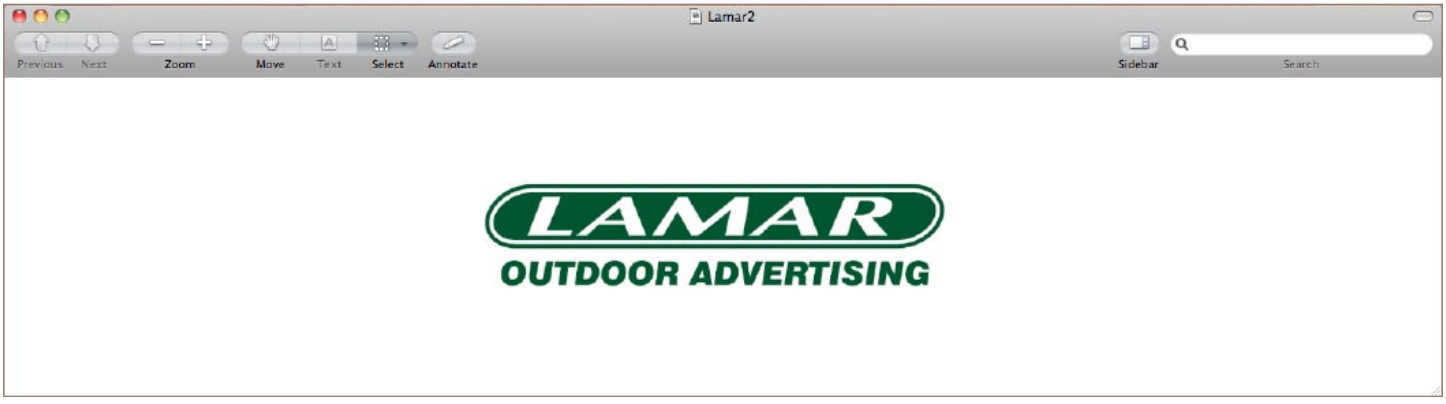
 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Next, click File > Save As...

Enter a new name for the image and choose JPEG for the format. Click Save.



The blank background will become white once you save it, and now there is plenty of white space around the logo so that when you upload it into Stride, you will be able to include the whole logo.



 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Quick-Reference Guide

Registering someone with check, cash, Square® payment, or other non-Stride credit transaction

1. Search for the registrant by selecting the "Records" tab. Click the "People" tab and enter their name, then click Search.

2a. If found, select their name from the list. Use the "Contact" tab to fill out any missing contact information, then save.

2b. If not found, select "New Contact" and complete their contact information, then click Save.

3. Select the "Registration" tab to begin registration. If the individual has not registered yet, select "Register for Down Syndrome Walk."

4. Fill out the registration information and select "Update Registrant Data."

5. Next, click the "Payments" tab.

6. Click "New Payment."

7. Use the "Payment Method" drop-down menu to select Cash, Check, or Credit. Enter a Reference ID. This can be any combination of letters and numbers, If you're registering multiple people with a check, enter the check number in the Reference ID field, then a dash followed by the registrant number. If the check number is 120 and it's the second registrant on that check, you would enter 120 - 2. This will help you stay organized for future reference.

8. Click "New Detail."

9. Use the "Payment Type" drop-down menu to select Fee.

10. Select the registration type under the "Fees" drop-down menu. Select your fee type and quantity of 1. Even if there is more than one registrant, enter only the first registrant's fee amount. Additional registrants should each be added under a new contact.

11. When you are done, select "Update Detail."

12. If you are registering more than one person with the same check, click New Contact and repeat the steps above for each registrant.

13. Click blue "Save Changes" box when you are done.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Quick-Reference Guide

Entering cash, check, Square®, or other check donations

1. Search for the registrant by selecting the "Records" tab. Click the "People" tab and enter their name, then click Search.

2a. If found, select their name from the list. Use the "Contact" tab to fill out any missing contact information, then save.

2b. If not found, select "New Contact" and complete their contact information, then click Save.

3. Next, click the "Payments" tab.

4. Click "New Payment."

5. Use the "Payment Method" drop-down menu to select Cash, Check, or Credit. Enter a Reference ID. This can be any combination of letters and numbers, If the payment method is check, we recommend entering the check number in the Reference ID field.

6. Click "New Detail."

7. Use the "Payment Type" drop-down menu to select Donation.

8. Use the "Allocation" drop-down menu to select GENERAL, INDIVIDUAL, or TEAM. If you're donating to an individual, use the "Registrant" drop-down menu that appears to the right to select the individual the donation is going to. If you're donating to a team, use the "Team" drop-down menu that appears to the right to select the appropriate team.

9. Enter the donation amount.

10. If the donation is to be anonymous, click the Anonymous slider to set it to ON. Conversely, if there is a recognition name or comment, enter it in the appropriate box.

11. Select "Update Detail."

12. When you are done, you can enter another donation if the individual wishes to donate to multiple registrants or teams. Otherwise, click the blue "Save Changes" button.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Quick-Reference Guide

Entering sponsorship payments

1. To create a new contact, log into the administrative side of your Stride site, then select the Records tab from your dashboard. Select "New Contact."
2. Fill out the required fields. You need to have a person / email address associated with the Business Name, so make sure to fill out all of these fields. Then, hit "Save Contact."
3. Next, you can enter the sponsorship amount you received as a payment under the new contact you just created. Click the "Payments" button.
4. Click "New Payment."
5. Select "New Detail."
6. Enter the information associated with the payment. The Reference ID field can be used to enter check numbers or other data as you see the need. You can use the Comment field to designate the payment as a sponsorship or sponsorship level such as gold sponsor. When you're done, click Update Detail.
7. Click "Save Changes." The goal tracker on your site will be updated with the new sponsorship funds.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Quick-Reference Guide

Adding a document to your site

1. To add a PDF document to your site, you need to first upload it to the File Library. On the administrative side of Stride, click Settings, then File Library (see left). Next, select Add Files.
2. Browse for and select the file you wish to upload, then click Open. Allow the file to load, then refresh the page (one way to do this is by holding down Ctrl and pressing the r key).
3. Next, click the icon in the Link column (right).
4. Copy the link in the box that comes up by pressing Ctrl+c or right-clicking and then selecting Copy (see lower right). Click OK to close the window.
5. Now that you have the link in your clipboard, click on Content, then New Content Page (see below).
6. Enter the name of your page in the Page Name text box. Then, use the "Type" drop-down menu to select "Link to external page."
7. Next, choose which tab you want your new content page to fall under by using the "Menu Parent" drop-down.
8. Enter a number in the Order Index box. This is what number the new page will appear under its parent tab. Enter "1" to make it the first page on the list, "2" for second, and so on. Next, set the "Visible" drop-down menu to "Yes." This makes the page visible on the public site. You can make a page invisible if you don't want it on your site but might decide to bring it back in the future.
9. Finally, paste the link that you copied earlier into the External Link box at the bottom of the page. You can do this by right clicking the box and selecting Paste, or pressing Ctrl+v on your keyboard. Don't worry about the drop-down menu to its left.
10. Now, click Save. Your PDF will appear on your home page under the tab you chose.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.

Quick-Reference Guide

Creating a Team

1. To create a team, **you will first need to create a contact record for the Team Captain** if they do not already have one. Search for the individual under the Records tab to see if they have a contact record.

2a. If found, skip to step 3. **Do not add them to a team yet.**

2b. If not found, register the individual. Select "New Contact" and complete their contact information, then click Save.

3. Select the "Registration" tab to begin registration. If the individual has not registered yet, select "Register for Down Syndrome Walk."

4. Fill out the registration information, **except for the team option**, and select "Update Registrant Data."

5. Next, click the "Payments" tab.

6. Click "New Payment."

7. Use the "Payment Method" drop-down menu to select Cash, Check, or Credit. Enter a Reference ID. This can be any combination of letters and numbers, If you're registering multiple people with a check, enter the check number in the Reference ID field, then a dash followed by the registrant number. If the check number is 120 and it's the second registrant on that check, you would enter 120 - 2. This will help you stay organized for future reference.

8. Click "New Detail."

9. Use the "Payment Type" drop-down menu to select Fee.

10. Select the registration type under the "Fees" drop-down menu. Select your fee type and quantity of 1. Even if there is more than one registrant, enter only the first registrant's fee amount. Additional registrants should each be added under a new contact.

11. When you are done, select "Update Detail."

12. Click blue "Save Changes" box when you are done.

Now that the Team Captain is registered, the following steps will show you how to start a team, then add the Team Captain to that team.

13. From the Records menu, click "New Team."

14. Change the Team Status to "Active," enter a team name and donation goal, **then use the Team Captain drop-down menu to select the team captain that you just registered**.

15. Click Save Team.

 Copyright © 2017 by ds-connex. Do not copy or distribute without expressed permission.