



**2016 Insurance Office of America
Corporate 5k**

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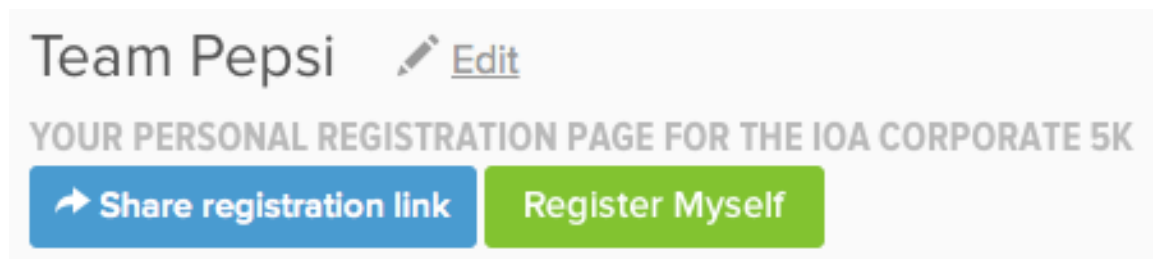
Creating your Team

Creating a team is easy! Just go to <http://trackshack.com/events-detail.php?id=90#> and click on Create Your Team. When the link opens, enter the information required to create your team. After creating your account, you'll be able to edit and add payment settings for your team.

* ORGANIZATION NAME		
<input type="text"/>		
* YOUR NAME		
<input type="text" value="First Name"/>	<input type="text" value="M.I"/>	<input type="text" value="Last Name"/>
* YOUR EMAIL		* YOUR PHONE NUMBER
<input type="text" value="ex: jdoe@gmail.com"/>		<input type="text" value="ex: (555) 555-5555"/>
* INDUSTRY		
<input type="text" value="Please Select"/>		
* ORGANIZATION ADDRESS		
<input type="text" value="Street Address"/>		
<input type="text" value="Apt, Suite, Unit"/>		
<input type="text" value="City"/>	<input type="text" value="Florida"/>	<input type="text" value="Zip"/>
* ORGANIZATION PHONE NUMBER		
<input type="text" value="ex: (555) 555-5555"/>		
* CREATE PASSWORD		* CONFIRM PASSWORD
<input type="text" value="*****"/>		<input type="text" value="*****"/>

Once you create your account, you can jump in and start inviting people to join your team and register for the event. It is important to remember that if you wish to participate, you (the captain) must register for the event as well.

To easily register yourself as the captain, please select Register Myself on your team account. By registering yourself with this button, we'll automatically place you as the team captain. Using the information you already provided to create your team, we'll pre-populate this registration form to make registration a breeze!

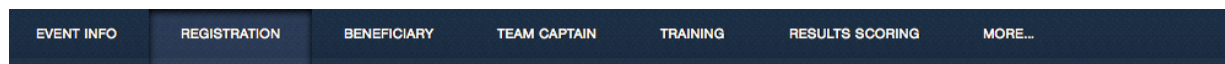


You'll also be able assign a captain by going to Team and clicking the drop down next to the participant's name. Then select "Make CEO".

Managing Your Team

To login to your account, go to <http://trackshack.com/events-detail.php?id=90>. Then select, Team Captains: Manage Your Team.

You should also bookmark, manage.hakuapp.com.



Sign me up!

Registration for the 2017 IOA Corporate 5k (April 13th, 2017) will go live in August. Stay tuned!

Team Captains: Use [Team Sign Up Instructions](#) for tips on how to successfully create and manage your team! If you plan on participating, don't forget to join after creating the team!

Runner/Walker: Use the [Registration Instructions](#) to successfully register. **Don't have a team?** Join the Track Shack Fitness Club Team. The code is: trackshack



Setting Up Your Payment Options

After logging in for the first time, you will be directed to Payments. From Payments, you'll be able to:

- Enter how many participants you will pay for and/or how much your company will pay for each participant
- Determine if you will accept guests (non-employees) on your team and if you will pay for their registration fees
- Securely save one or many credit cards you will use to pay for registrations. This will make paying for registrations even easier! Please note: we use the same security as banks to ensure your data is protected.
- Manage your invoices (if choosing to mail in a check).
- See every transaction so you can keep track of all your payments

The screenshot shows the 'Payments' settings page. The left sidebar includes: Dashboard, Team, Products, Payments (highlighted), Team Page, and Settings. The main content area has tabs for Settings, Invoices, and Transactions. Under 'CREDIT CARD INFO', there is an 'Add New Card' button and a 'New Card' entry. The 'PAYMENT OPTIONS' section includes:

- WILL YOUR ORGANIZATION PAY FOR REGISTRATIONS?** (YES)
- ALLOW GUESTS TO REGISTER?** (YES)
- HOW MANY ARE YOU COVERING?**
 - Only 5 registrations and pay the full amount (include guests?)
 - Only 10 registrations and pay up to 30.00 \$ (include guests?)

A note at the bottom states: "The first 5 team members are covered in full. When that is exhausted, the next 10 team members and guests are covered only for the first \$30.00". There is also a "+ Add another payment option" link.

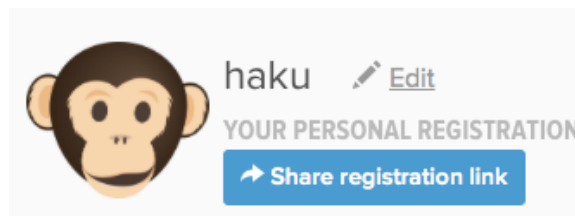
Note: On the example above, the company is accepting guests and is paying the full price for the first 5 employees (notice guests is NOT selected for the first tier) and \$30.00 for the next 10 people that register (guests and employees since guests is checked). Anyone that registers after these 15 members will have to pay the full price of registration to join the team.

Inviting Members

From the Dashboard, you can copy your team's custom registration link or enter any email address and send them a message from the system. Send this link to everyone you want to join your team. After they register, you will have the opportunity to approve or deny them before paying for their registration.

There are two steps to share your team's registration link:

1. Click on Share registration Link



2. Either send emails directly from our email form or copy the link and send it to everyone you want to join your team - even feel free to text our mobile-friendly registration form to recipients, too!

Share the Event ×

Send an Email

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Come join team Track Shack Fitness Club at the IOA Corporate 5k on Thursday, April 13, 2017 at 06:45 PM. Only 238 days left to register. Register today! <http://stg.haku.ly/2a31b8>

Get the Link

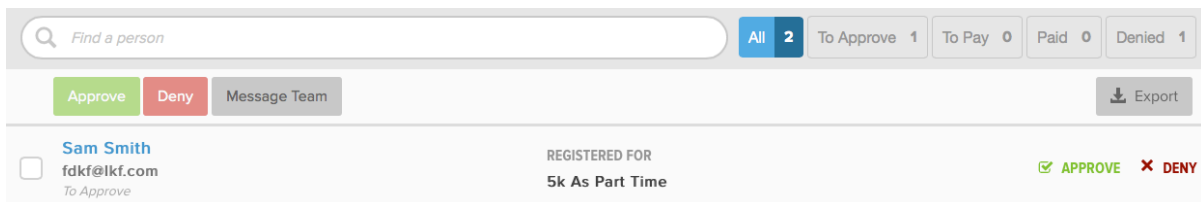
Rather send the invites from your email? Simple, just copy the link below and send it however you'd like!


Copy Link

Send

Approving and Denying Participants

From the Team section, you can see the participants you've approved, denied, paid for, and those who are pending approval. When a participant registers, they will appear on the pending to approve list. From this list, you can choose to approve or deny them. Once approved, you will be prompted to pay for those registrations. You can pay for registrations all at once or as they come in. It is important to remember that registrations are NOT finalized until payment is received. Once your team is finalized, you can easily extract the list of your team (paid members only) to Excel. If you deny a participant, you can enter a reason that they will see on the denial email the participant will receive.



After you pay for your team, use the  button to download a CSV list of your team. The list will include shirt sizes in case you are ordering custom company shirts for your team. You can also filter participants by clicking on the filters, or you can search for a participant using the search box. There are five filters:

All - Shows all statuses

To Approve - Shows only the participants awaiting approval

To Pay - Shows participants pending payment

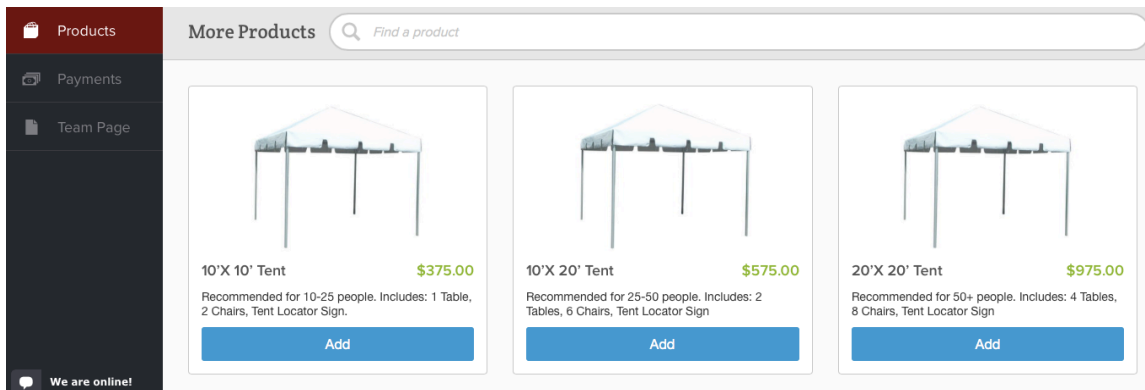
Paid - Shows paid members

Denied - Shows any participant you denied.

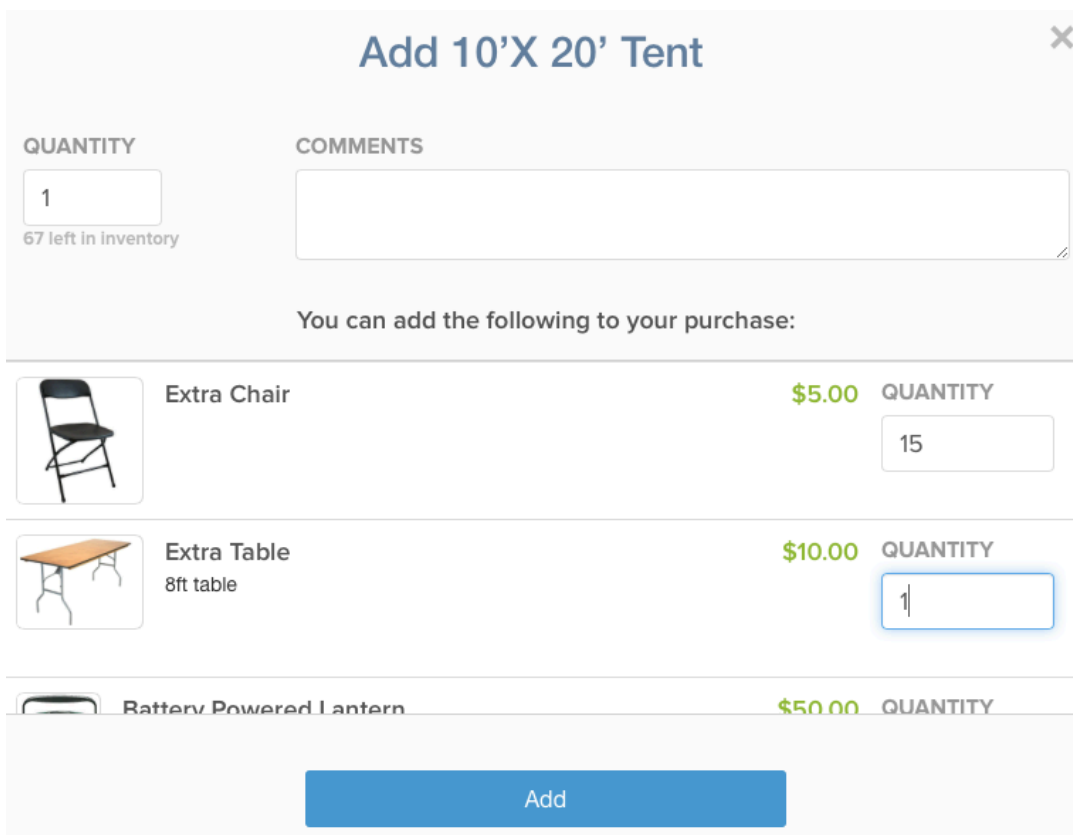
Pro Tip: To "un-deny" a participant, click on the down arrow next to messages and click on Move To Approve.

Purchasing Products

Products are offered through your account and can make your team's IOA Corporate 5k experience even better! Simply go to Products on your team account. Click on Add on the products you would like to purchase.



Then you'll be able add and any additional items to your purchase.



Paying for Registrations using a Credit Card (Recommended)

After approving registrations, you will be immediately prompted to pay for them. You will see a Pay Balance button on the top of the screen. You can pay for registrations, but it will not become final until they are fully paid for. After paying for registrations, each participant will receive a confirmation email.

Pro Tip: Login 2-3 times per week to approve participants and pay for approved registrations.

Hi Lorenzo, you have a new balance of **\$945.30**. Pay Balance Create Invoice

Find a person All 5 To Approve 1 To Pay 0 Paid 4 Denied 0 Download

Approve Deny Send Message

After clicking the Pay Balance button, you will be prompted to make a payment using a stored credit card or you can always enter a new one.

Registration Checkout

SELECT CARD
Corporate Card #1

NAME ON CARD
Jose

CREDIT CARD NUMBER
**** * 4242

EXPIRATION DATE **CVC#**
November 2015 ***

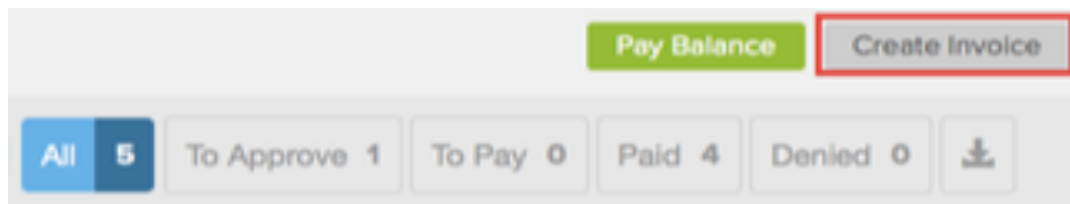
Summary
2 Registrations \$80.00
Total \$80.00
Promo Code Apply

Pay Now

Also, every time you pay an open balance, an invoice marked Paid will be created including all registrations or products paid in that instance.

Paying for Registrations by Creating an Invoice and Mailing a Check

Need to mail a check? No problem! You can create invoices for registrations. You can create an invoice for approved registrations. Once you have an open balance, click on Create Invoice and it will add the registrations to an invoice.



After the invoice is created, mail a check for the exact amount payable to **Track Shack**. Once your payment is received, registrations will be confirmed. You can create multiple invoices if you need to.

Pro Tip: You can always pay your invoices/outstanding balances using a credit card. Outstanding balances will include any open invoices and any new balance you may have.

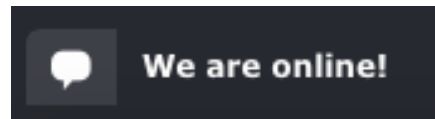
You can manage your invoices from the payments section and clicking on the Invoices tab. You can always print an invoice for your records or to use as a receipt of your transaction.


Settings	Invoices	Transactions		
<input type="text" value="Find an invoice"/>				
INVOICE NUMBER	DATE	STATUS	AMOUNT	
1004	12/05/2014	Paid	\$945.30	Print

Customer Support

Have any questions about your account? We'll be happy to help you out!

If we're online, feel free to click on the We are online button on the bottom left of your screen and begin an instant message conversation.



You can also leave a ticket for us to answer. Simply click on the  on the top left of your account page. From here you'll get three options:

HELP CENTER

OPEN SUPPORT TICKET

CALL US AT 1-877-375-4795

FAQs

1. **How do I invite members to join my team?**

Adding members is easy! You can share your team's custom registration link to anyone you want to join your team from the Dashboard.

2. **Can anyone join my team?**

Only people you invite will join your team. If your organization is covering all or some of registration fee, all captains must approve or deny each participant that registers for your team so you have full control of which participants you will ultimately pay for.

3. **Do I have to enter my credit card every time I pay?**

Nope! You can store one or many credit cards and use them to make payments to registrations and/or products.

4. **I don't have a company credit card; can I pay using a check?**

Yes! All you have to do is create an invoice for your approved registrations. After the invoice is created, print it out and mail it to Track Shack.

5. **Can I pay the full cost of registration only for a few employees and after that only pay for half?**

Yes, you can! On the Payments section, you can determine how many participants you will pay for. You can also determine if you will pay for all or some of their registration fee.

6. **My team allows guests to join the team, but we don't pay for their registration fee. Can they still join our team?**

Yes, they can. From the Payment section, simply choose to accept guests, but do not apply any of your payment tiers to them. Guests will be able to join your team but will have to pay for their registration.

7. **Can I extract my team list?**

From the Team tab, you can download your paid participants on a CSV file (Excel). The extract will even include everyone's shirt size in case you need the sizes list to order your own company shirts.

8. **Someone selected the wrong shirt size! What do I do?**

Don't panic! By clicking on the paid participant, you can update their shirt size.

9. **I need to replace the captain or can I give access to someone else to manage my team?**

Simply contact the event organizer via annie@trackshack.com. and they will walk you through it.

10. **How do I assign someone as CEO?**

Click on Teams and click on the arrow next to messages for the participant you want to flag as CEO. The CEO is the senior most participating employee from the company. Teams are not required to assign a CEO.

Note: Only one participant can be flagged CEO.

11. **I am always on the go; can I manage my team on my mobile device?**

Team Captain Tools are designed to work on any smart phone! Go to manage.hakuapp.com from your phone's browser and login like you normally would. The desktop version has a bit more functionality, but you can do almost everything from your phone. You can access your team's dashboard, send the registration link, approve/deny participants, and make payments.

12. **I am completely lost, I see an error, or the app doesn't work. Who can help me?**

For all event specific questions, contact the event staff at annie@trackshack.com. If you are having issues using the application, contact haku tech support from the captains tool by clicking on the We are Online button, email them your questions by clicking Open Support Ticket or by calling them at 844-299-2087.