



## Adding an Offline Donation Credited to a Participant

A donor can choose to make a donation credited to a Participant vs a Team or the overall Event.

Login to the EMC and select the event you would like to manage.

- Click on the **Customer Service** tab.
- Click **Manage Participants**, under the Related Actions menu.
- **Scroll** or **Search** for the **Participant Name**.
- Click **Manage Participant**, under the Action column.
- Click **Record Donation**, under the Related Actions menu.

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Event Center Event Web Site Event Emails **Customer Service** Reports [+ Switch To Another Event](#)

Customer Service Daffodil Dash - Columbia Valley 2016

Related Actions

- Manage Participants**
- Manage Teams
- Manage Companies

Your Customer Service

If you have the appropriate permissions, from this Customer Service area, you can work with:

- Participants registered for this event to view and update their contact, registration, and gift information as well as register new participants

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**Customer Service > Manage Participants** Daffodil Dash - Columbia Valley 2016

**Search for Participants** Register New Participant

Search Tool

This is a list of participants registered for this TeamRaiser arranged in alphabetical order in pages of 20 records per page, and contains either all registered participants or only the participants returned from the last search performed.

Records 1 - 3 of 3 [First](#) [Previous](#) [Next](#) [Last](#)

Name	Action	Email	Event Name
McKell, Janis	<a href="#">Manage Participant</a>	jmkcell@bc.cancer.ca	Daff_Dash_BC_SIR_Columbia_Valley_2016
Oldershaw, Amanda	<a href="#">Manage Participant</a>	aoldershaw@bc.cancer.ca	Daff_Dash_BC_SIR_Columbia_Valley_2016
Test, Cheryl	<a href="#">Manage Participant</a>	cmaranda@bc.cancer.ca	Daff_Dash_BC_SIR_Columbia_Valley_2016

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**Customer Service > Manage Participants > Manage Participant** Daffodil Dash - Columbia Valley 2016

Related Actions

- Record Donation**
- Edit Contact Information
- Edit Registration
- Make Inactive
- Remove From All Teams
- Make Private
- Create New Team
- Change Team
- Reset Password
- Edit Pages

This is a summary that shows the contact, registration, Personal Page, team, and fundraising information for the selected participant and the tools that you can use to work with this information.

**Name:** Ms. Amanda Oldershaw  
**Email:** aoldershaw@bc.cancer.ca  
**Username:** amandaoldershaw  
**Participation Type:** Adult  
**Registration Type:** Offline  
**Fundraising Goal:** \$0.00  
**Registration Status:** Active  
**Personal Page:** Public  
**Team Name:** Norah's Granny Nanny's  
**Team Rank:** Captain

Gift History



- On 1. Enter Donor Information screen, enter the **First Name** and **Last name** field as per the [Offline Donor Naming Convention](#) document.
- The only fields populated in this screen should be the First Name and Last Name. **Do Not Add the Donor Information Here**
- Click next to search for the existing Offline Donor record. If the record does not exist it will take you directly to the Configure Gift Screen.

1. Enter Donor Information

2. Configure Gift

1. Donor Information:

Specifies the Profile information in the constituent record of this participant (Note: If the gift payment will be made with a credit card or bank account withdrawal, the name here must match exactly with the name on the corresponding credit card or bank account.)

Title: [ ] First name: **Daff Dash Offline Donor** Middle name: [ ] Last name: **Columbia Valley 2016** Suffix: [ ] Professional Suffix: [ ]

\* Name: [ ]

Address 1: [ ]

Address 2: [ ]

City: [ ]

Province: [ ]

Postal code: [ ]

Country: Canada [ ]

Email: [ ]

Phone: [ ]

Only populate the First Name and Last Name fields on this screen with the Offline Donor Information

**First Name: Daff Dash Offline Donor**

**Last Name: Columbia Valley 2016**

**DO NOT ADD THE DONOR INFORMATION HERE**

Next or Cancel

Once the First Name and Last Name fields are populated with the correct information, Clicking Next will activate the Search Feature

1. Enter Donor Information

2. Resolve Record

3. Configure Gift

1. Choose an existing constituent or create a new one.

We found one or more existing constituents that are very similar to the information you entered. Please review these constituents to see if we already have a record for this person.

Create a new constituent or select an existing one

\* = Required fields

Create **← Please do not Create a New Record - use the existing one below**

Title: [ ] Street 1: [ ]

\*First name: Daff Dash Offline Donor Street 2: [ ]

\*Last name: Columbia Valley 2016 City: [ ]

Suffix: [ ] State/Province: [ ]

Email: [ ] Zip/Postal Code: [ ]

Phone: [ ] Country: Canada

Select

Title: [ ] Street 1: [ ]

\*First name: Daff Dash Offline Donor Street 2: [ ]

\*Last name: Columbia Valley 2016 City: [ ]

Suffix: [ ] State/Province: [ ]

Email: [ ] Zip/Postal Code: [ ]

Phone: [ ] Country: Canada

Select the existing Offline Donor record rather than creating a new one.



## Configure Gift Screen

1. **Gift Type** – always one time
2. **Gift Amount** – add the gift amount
3. **Do Not Display Amount** – check this box if the donor does not want the gift amount to show on the Participant Page
4. **Recognition Name** – Add the Donor Name here if they wish to be recognized on the Participant Page, otherwise type Anonymous
5. **Batch ID** – Enter the Deposit Slip Number if this is a Batch Entry – See Entering Batch Donations
6. **Payment Method** – **ALWAYS CASH**
7. **Payment Status** – **ALWAYS UNCONFIRMED**
8. Click Process to complete.

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Customer Service > Daff\_Dash\_BC\_SIR\_Columbia\_Valley\_2016 > Gift Information | Daffodil Dash - Columbia Valley 2016

1. Enter Donor Information

2. Configure Gift

\* 1. Gift Type:  
Defines if this gift payment will be made with one single payment or in multiple payments on a recurring scheduled basis  
 One time **Always one time gift**  
 Recurring

\* 2. Gift Amount:  
Defines the monetary amount of the single payment or of each payment to be collected for this gift  
\$10.00 **Add Gift amount**

3. Do Not Display Amount:  
Determines if the amount of a gift is displayed in gift lists on the site (Note: The donor name may still be visible.)  
 Do not display the gift amount **Check the box if the donor does not want the gift amount to show on the Participant page**

4. Recognition Name:  
Defines the name to display on the gift lists instead of the name entered for Billing Information (Note: Leave this blank to display the name from the Billing Information or enter Anonymous if requested by the donor.)  
Add Donors Name Here or Anonymous **Add the Donor Name here if they wish to be recognized on the Participant Page, otherwise type Anonymous**

5. Batch ID:  
Groups a set of offline gifts being processed at the same time

6. Payment method  
Determines the method by which the gift will be collected (Note: Additional fields may display upon option selection.)  
 Cash **ALWAYS CASH**  
 Check

Payment Status:  
Determines if payment has been received (that is, you have the cash or check in-hand)  
 Confirmed  
 Unconfirmed **ALWAYS UNCONFIRMED**

[Process](#)  
[Process and Add Another](#)

Click to complete



To see a list of all the "Participant Gifts"

- Click on the **Customer Service** tab.
- Click **Manage Participants**, under the Related Actions menu.
- **Scroll** or **Search** for the **Participant Name**.
- Click **Manage Participant**, under the Action column.

The screenshot shows the 'Manage Participant' page for Ms. Amanda Oldershaw. The breadcrumb trail is 'Customer Service > Manage Participants > Manage Participant'. The page title is 'Daffodil Dash - Columbia Valley 2016'. The 'Related Actions' menu on the left includes 'Record Donation', 'Edit Contact Information', 'Edit Registration', 'Make Inactive', 'Remove From All Teams', 'Make Private', 'Create New Team', 'Change Team', 'Reset Password', and 'Edit Pages'. The main content area shows participant details:

- Name: Ms. Amanda Oldershaw
- Email: aoldershaw@bc.cancer.ca
- Username: amandaoldershaw
- Participation Type: Adult
- Registration Type: Offline
- Fundraising Goal: \$0.00
- Registration Status: Active
- Personal Page: Public
- Team Name: Norah's Granny Nanny's
- Team Rank: Captain

Below the details is the 'Gift History' section, showing 'Records 1 - 1 of 1'. A search bar and pagination controls are present. The gift history table is as follows:

Name	Action	Gift Type	Donation Type	Gift Date	Amount
Daff Dash Offline Donor Columbia Valley 2016 (Test Donation)	<a href="#">View/Edit</a>	Offline Unconfirmed (Cash)	Gift	06/02/2016	\$10.00

At the bottom of the table, it shows 'Records 1 - 1 of 1' with navigation links: [First](#), [Previous](#), [Next](#), [Last](#).

**Note:** The soft credit and/or donor cannot be changed on an Offline Gift. If there was an entry error made the gift must be deleted and re-entered correctly.

To have a gift deleted please email [digital@cancer.ca](mailto:digital@cancer.ca). Please include the Event Name, Participant/Team Name (if applicable), the type of gift Online or Offline, gift amount and gift date. Screen shots are always welcome.