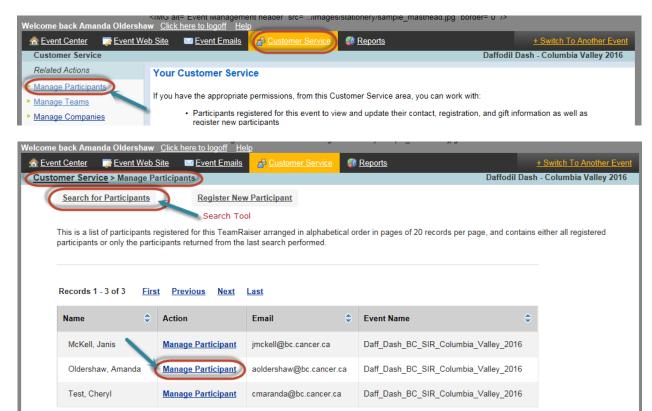


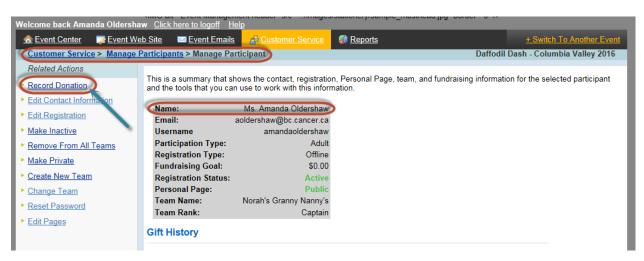
Adding an Offline Donation Credited to a Participant

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.

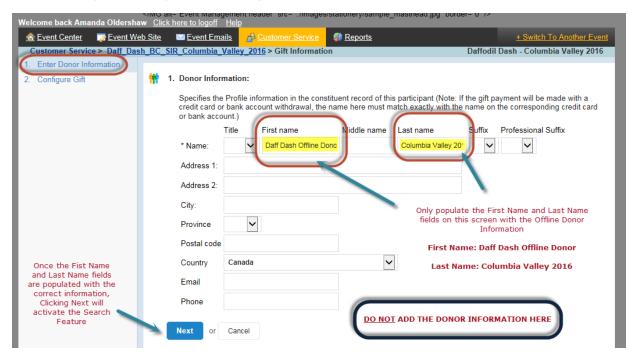
- Click on the Customer Service tab.
- Click Manage Participants, under the Related Actions menu.
- Scroll or Search for the Participant Name.
- Click *Manage Participant*, under the Action column.
- Click Record Donation, under the Related Actions menu.

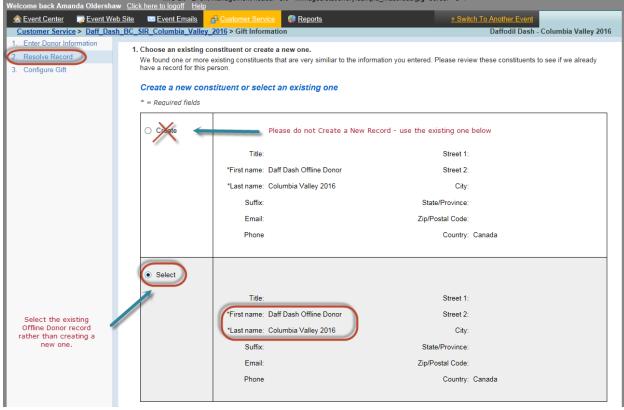






- On 1. Enter Donor Information screen, enter the *First Name* and *Last name* field as per the <u>Offline Donor Naming Convention</u> document.
- The only fields populated in this screen should be the First Name and Last Name. Do Not Add the Donor Information Here
- Click next to search for the existing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

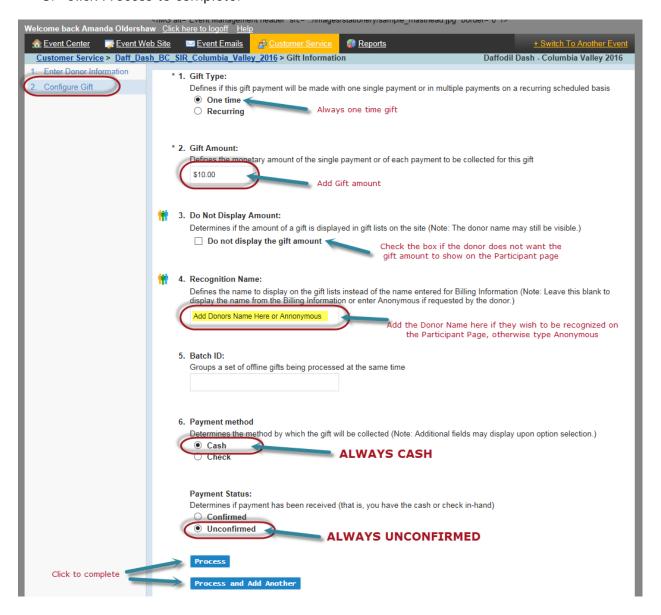






Configure Gift Screen

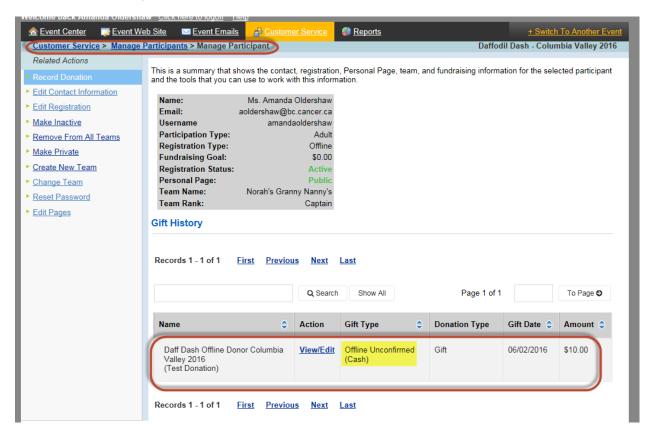
- 1. Gift Type always one time
- 2. Gift Amount add the gift amount
- 3. **Do Not Display Amount** check this box if the donor does not want the gift amount to show on the Participant Page
- 4. **Recognition Name** Add the Donor Name here if they wish to be recognized on the Participant Page, otherwise 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.





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.



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 <u>digital@cancer.ca</u>. 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.