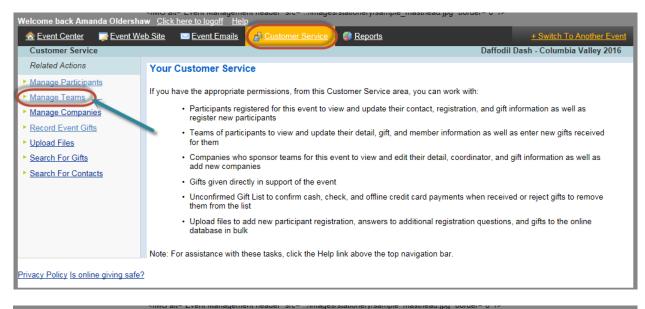


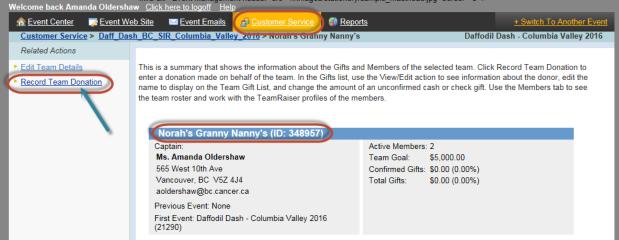
Adding an Offline Donation Credited to a Team

A donor can choose to make a donation credited to the Team vs a Participant 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 Teams, under the Related Actions menu.
- Scroll or Search for the Team Name
- Click Manage.
- Click *Record Team Donation*, under the Related Actions menu.







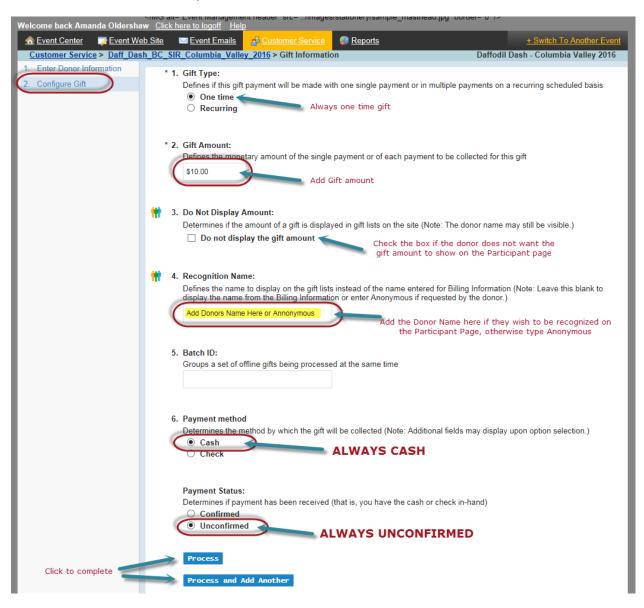
- On 1. Enter Donor Information screen, enter the *First Name* and *Last name* field as per the <u>Offline Donor Naming Convention</u> document.
- The only fields populated in this screen should be the First Name and Last Name. *Do Not Add the Donor Information Here*
- Click next to search for the existing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

n 🔝 Event Center 🛛 🐺 Event We	w <u>Click here to logoff</u> <u>Help</u>						
		Reports + Switch To Another Event					
1. Enter Donor Information	h_BC_SIR_Columbia_Valley_2016 > Gift Information	Daffodil Dash - Columbia Valley 2016					
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 Niddle name Last name Suffix Professional Suffix						
	* Name: Daff Dash Offline Dong	Columbia Valley 20'					
	Address 1:						
	Address 2:	``					
	City: Province	Only populate the First Name and Last Name fields on this screen with the Offline Donor					
Once the Fist Name and Last Name fields are populated with the	Postal code	Information First Name: Daff Dash Offline Donor					
	Country Canada	Last Name: Columbia Valley 2016					
	Email						
correct information, Clicking Next will	Phone						
activate the Search Feature	Next or Cancel	DO NOT ADD THE DONOR INFORMATION HERE					
	UNCAL OF CALCER						
Welcome back Amanda Oldershaw (lick here to logoff Help						
🏠 Event Center 🛛 🐺 Event Web Sit		+ Switch To Another Event					
	C_SIR_Columbia_Valley_2016 > Gift Information	Daffodil Dash - Columbia Valley 2016					
1. Enter Donor Information							
Enter Donor Information Resolve Record		ar to the information you entered. Please review these constituents to see if we already					
	We found one or more existing constituents that are very simili have a record for this person.						
2. Resolve Record	We found one or more existing constituents that are very simili have a record for this person. Create a new constituent or select an existing of						
2. Resolve Record	We found one or more existing constituents that are very simili have a record for this person.						
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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 "Team Gifts"

- Click on the *Customer Service* tab.
- Click Manage Teams, under the Related Actions menu.
- Scroll or Search for the Team Name
- Click *Manage*.
- Click *Record Team Donation*, under the Related Actions menu.

 Welcome back Amanda Oldershaw Click here to logoff Help								
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Customer Service > Daff_Das	<u>sh_BC_SIR_Columbia_Valley_2016</u> > No	rah's Granny Nanny's		Daffodil Dash - O	Columbia Valley 2016			
Related Actions								
Edit Team Details	This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to							
Record Team Donation	enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see							
	the team roster and work with the TeamRaiser profiles of the members.							
	Norah's Granny Nanny's (ID: 348957)							
	Captain:	Active Members: 2						
	Ms. Amanda Oldershaw	Team Goal: \$5,000.00						
	565 West 10th Ave Vancouver, BC V5Z 4J4	Confirmed Gifts: \$0.00 (0.00%) Total Gifts: \$5.00 (0.10%)						
	aoldershaw@bc.cancer.ca	Total Gills. \$5.00 (0.10%)						
	Previous Event: None							
	First Event: Daffodil Dash - Columbia Valley 2016							
	(21290)							
	Gifts <u>Members</u>							
	Records 1 - 1 of 1 First Previous Next Last Shows on Behalf of Team vs a Participant Name							
	a Parucipant Name							
	Q Search Show All Page 1 of 1				To Page 😂			
	Name 🗘	Action Gift Ty	pe 🌲 Gift	Date 🖨 Amount	On Behalf of 🌲			
	Daff Dash Offline Donor Columbia Valley 2016	View/Edit Offline (Cash)	Unconfirmed 06/0	1/2016 \$5.00	Team			
Records 1 - 1 of 1 <u>First</u> <u>Previous</u> <u>Next</u> <u>Last</u>								

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.