



## 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.

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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](#)
- ▶ [Record Event Gifts](#)
- ▶ [Upload Files](#)
- ▶ [Search For Gifts](#)
- ▶ [Search For Contacts](#)

**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
- Teams of participants to view and update their detail, gift, and member information as well as enter new gifts received for them
- Companies who sponsor teams for this event to view and edit their detail, coordinator, and gift information as well as add new companies
- Gifts given directly in support of the event
- Unconfirmed Gift List to confirm cash, check, and offline credit card payments when received or reject gifts to remove them from the list
- Upload files to add new participant registration, answers to additional registration questions, and gifts to the online database in bulk

Note: For assistance with these tasks, click the Help link above the top navigation bar.

[Privacy Policy](#) [Is online giving safe?](#)

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Customer Service > Daff\_Dash\_BC\_SIR\_Columbia\_Valley\_2016 > Norah's Granny Nanny's Daffodil Dash - Columbia Valley 2016

**Related Actions**

- ▶ [Edit Team Details](#)
- ▶ [Record Team Donation](#)

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to 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
<b>Ms. Amanda Oldershaw</b>	Team Goal: \$5,000.00
565 West 10th Ave	Confirmed Gifts: \$0.00 (0.00%)
Vancouver, BC V5Z 4J4	Total Gifts: \$0.00 (0.00%)
aoldershaw@bc.cancer.ca	
Previous Event: None	
First Event: Daffodil Dash - Columbia Valley 2016 (21290)	



- 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.

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

1. Enter Donor Information (highlighted)

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	Middle name	Last name	Suffix	Professional Suffix
	Daff Dash Offline Dono		Columbia Valley 2016		

Address 1:

Address 2:

City:

Province:

Postal code:

Country: Canada

Email:

Phone:

**Next** or Cancel

**DO NOT ADD THE DONOR INFORMATION HERE**

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**

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

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

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

1. Enter Donor Information

2. Resolve Record (highlighted)

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

<input type="radio"/> Create	Please do not Create a New Record - use the existing one below
	<p>Title: _____ Street 1: _____</p> <p>*First name: Daff Dash Offline Donor Street 2: _____</p> <p>*Last name: Columbia Valley 2016 City: _____</p> <p>Suffix: _____ State/Province: _____</p> <p>Email: _____ Zip/Postal Code: _____</p> <p>Phone: _____ Country: Canada</p>
<input checked="" type="radio"/> Select	<p>Title: _____ Street 1: _____</p> <p>*First name: Daff Dash Offline Donor Street 2: _____</p> <p>*Last name: Columbia Valley 2016 City: _____</p> <p>Suffix: _____ State/Province: _____</p> <p>Email: _____ Zip/Postal Code: _____</p> <p>Phone: _____ Country: Canada</p>

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

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  
 **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 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 "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.

Customer Service > Daff Dash BC SIR Columbia Valley 2016 > Norah's Granny Nanny's

Related Actions

- Edit Team Details
- Record Team Donation

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**Norah's Granny Nanny's (ID: 348957)**

<p>Captain: <b>Ms. Amanda Oldershaw</b> 565 West 10th Ave Vancouver, BC V5Z 4J4 aoldershaw@bc.cancer.ca</p> <p>Previous Event: None First Event: Daffodil Dash - Columbia Valley 2016 (21290)</p>	<p>Active Members: 2 Team Goal: \$5,000.00 Confirmed Gifts: \$0.00 (0.00%) Total Gifts: \$5.00 (0.10%)</p>
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Gifts Members

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

Shows on Behalf of Team vs a Participant Name

Q Search Show All Page 1 of 1 To Page

Name	Action	Gift Type	Gift Date	Amount	On Behalf of
Daff Dash Offline Donor Columbia Valley 2016	<a href="#">View/Edit</a>	Offline Unconfirmed (Cash)	06/01/2016	\$5.00	Team

Records 1 - 1 of 1 [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.