



Adding an Offline Donation Credited to an Event

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

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

- Click on the **Customer Service** tab.
- Click **Record Event Gifts**, under the Related Actions menu.
- Click on **Record Event 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.

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Customer Service > Daff_Dash_BC_SIR_Columbia_Valley_2016 Daffodil Dash - Columbia Valley 2016

Related Actions

- ▶ **Record Event Donation**

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This is a list of Event Gifts that have been entered for this TeamRaiser. Click the View/Edit action for more information or to edit details about the gift. For gifts that you have received, click the Confirm action to approve the gift and add the amount to the gift totals. Click the Reject action to remove the gift from all lists and subtract it from any expected donation amount totals for the event. Click the Set Batch ID related action to set a batch number that you can use to group all confirmed and rejected gifts in a batch.

Event Gifts

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Name	Action	Gift Type	Gift Date	Amount
No gifts				

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- 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**

Click to complete **Process**
Process and Add Another



To see a list of all the “Event Gifts”

- Click on the **Customer Service** tab.
- Click **Record Event Gifts**, under the Related Actions menu.

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Related Actions

- ▶ [Record Event Donation](#)

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Event Gifts

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Name	Action	Gift Type	Gift Date	Amount
Daff Dash Offline Donor Columbia Valley 2016	View/Edit	Offline Unconfirmed (Cash)	1-Jun-2016	\$5.00
Daff Dash Offline Donor Columbia Valley 2016	View/Edit	Offline Unconfirmed (Cash)	1-Jun-2016	\$5.00

Records 1 - 2 of 2 [First](#) [Previous](#) [Next](#) [Last](#)

Note: The soft credit and/or gift 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. 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.