



Adding an Offline Registration

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

- Click on the **Customer Service** tab.
- Click **Manage Participant**, under the Related Actions menu.
- Click **Register New Participant**

When entering a new Participant, always check and see if the participant already has a record in the database. There is no obvious search button on this screen, but if you add the First Name and Last Name only then click next it will provide you with all the records of the same name in the database.

- Add Participants **First Name and Last Name only**
- Click **Next**

The screenshot shows the 'Create a new constituent or select an existing one' form in the EMC system. The form is titled 'Daffodil Dash - Columbia Valley 2016' and is part of the 'Customer Service > Manage Participants > Resolve Duplicate' workflow. The form is divided into two main sections: 'Create' and 'Select'. The 'Create' section is highlighted with a red box and an arrow pointing to the 'Create' radio button. A red annotation next to it says 'Creates a new record.' The 'Select' section is also highlighted with a red box and an arrow pointing to the 'Select' radio button. A red annotation next to it says 'Uses existing record. Check the information below to ensure it matches the information on the Registration Form'. The form contains several fields for personal and contact information, including Title, First name, Last name, Suffix, Email, Phone, Street 1, Street 2, City, State/Province, Zip/Postal Code, and Country. The 'Select' section shows a pre-filled record for Amanda Oldershaw, with a blue link for the email address 'aoldershaw@bc.cancer.ca'.

If the Participant has an existing record in the database:

- **Select** that record
- Click **Next**

If the Participant does not have an existing record:

- Choose **Create**
- Click **Next**
- Click **Enter Details**, in the left hand menu
- Add the remaining information for the participant that has been provided on the form (address, email, phone etc)
- Click **Next**



Select Participant Type:

- Choose the **Participant Type** from the dropdown menu
- Choose the **participant search and display name option** best suited for the participant
- Type in a **Fundraising Goal**
- Click Next

The screenshot shows the 'Select Participation' page in the EMC system. The page title is 'Daffodil Dash - Columbia Valley 2016'. The breadcrumb trail is 'Customer Service > Manage Participants > Select Participation'. A left-hand navigation menu lists: 1. Enter Details, 2. Select Participation Type (highlighted), 3. Create Team, 4. Answer Questions, and 5. Confirm Details. The main content area contains five sections:

- 1. Participation Type:** Identifies the way in which this person will participate in this TeamRaiser. A dropdown menu is set to 'Adult'.
- 2. Participant Search and Display Name Option:** Determines if this participant wants their first and last name or a screen name to display to site visitors viewing pages and lists for this fundraiser or in results when someone searches for them or a name similar to theirs. Three radio button options are present:
 - Use First and Last Name** ([Tell me more](#))
 - Keep User Anonymous** ([Tell me more](#))
 - Use my nickname and make my personal page public** ([Tell me more](#))
- 3. Fundraising Goal:** Defines the amount of money this participant intends to raise. A text input field contains '150'.
- 4. Emergency Contact:** Identifies the name of the person to contact in case of an emergency. An empty text input field is shown.
- 5. Emergency Phone:** Defines the phone number to call in case of an emergency. An empty text input field is shown.

At the bottom, there are 'Next' and 'Cancel' buttons with 'or' between them. Annotations with arrows point to the 'Use First and Last Name' option (labeled 'Best Option'), the 'Keep User Anonymous' option (labeled 'If this option is selected, the participants name/page will not appear online or in the search'), the '150' value (labeled 'Participants can change this later in their Participant Centre'), and the empty input fields for Emergency Contact and Emergency Phone (labeled 'These fields are not required').



Create Team Page:

Different options will be provided based on the option chosen in the first question.

No Team

- Choose this option if the person is participating as an individual

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

1. Enter Details
2. Select Participation Type
3. Create Team
4. Answer Questions
5. Confirm Details

*** 1. Team Participation Type:**
Determines if the participant will be on a team

- No Team** *Choose this option if the person is participating as an individual*
- Join an Existing Team
- Create New Team
- Bring back a team from a previous event

Participant Company:
Identifies the company associated with or sponsoring this participant

- Find your company
- Enter your company name *Leave blank if there is no company association*

Next or **Cancel**

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Join an Existing Team

- Choose this option if the participant will be joining a team that has already registered online.
- A search feature is provided to find the Team Name provided

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

1. Enter Details
2. Select Participation Type
3. Create Team
4. Answer Questions
5. Confirm Details

*** 1. Team Participation Type:**
Determines if the participant will be on a team

- No Team
- Join an Existing Team** *Select this option if the participant will be joining a Team that already registered and set-up online*
- Create New Team
- Bring back a team from a previous event

Search Existing Teams

Search for a team to add this participant to.

Team name:

Search

Search Results

Lists teams matching your search criteria. Click the select link to add the participant to that team.

Next or **Cancel**



Create a New Team

- Choose this option if the participant has indicated they would like to be a Team Captain.
- Type in the Team Name provided by the participant
- Add the Team Goal – amount raised by the entire team. This can be changed later in the Participant Centre

The screenshot shows the 'Register New Participant' form for the 'Daffodil Dash - Columbia Valley 2016' event. The form is titled '1. Team Participation Type: Determines if the participant will be on a team'. It has four radio button options: 'No Team', 'Join an Existing Team', 'Create New Team', and 'Bring back a team from a previous event'. The 'Create New Team' option is selected. A red annotation with an arrow points to this option, stating: 'Select this option if the participant has indicated they would like to be a Team Captain.' Below this is a 'Team Name' field with the label 'Identifies the team'. A red annotation with an arrow points to the field, stating: 'Type in the Team Name'. Below that is a '2. Team Goal:' section with a 'Team Goal:' label and a text input field containing '\$0.00'. A red annotation with an arrow points to the field, stating: 'Add the Team Goal. The participant can change this later in the Participant Centre'. Below that is a 'Team Company:' section with the label 'Identifies the company associated with or sponsoring this team'. It has two radio button options: 'Find your company' (selected) and 'Enter your company name'. A red annotation with an arrow points to the 'Find your company' option, stating: 'Complete this question only if the team is associated to a company/business'. At the bottom are 'Next' and 'Cancel' buttons.

Bring Back a Team from a Previous Event

- Choose this option if this a Returning Team (this option will only work if the correct record associated with last year's team was selected in step 1. If a new participant record was created there will be no history on that record of last year's team.)
- Enter the returning Team Name into the search
- Select the Team from the search Results

The screenshot shows the 'Register New Participant' form for the 'Daffodil Dash - Columbia Valley 2016' event. The form is titled '1. Team Participation Type: Determines if the participant will be on a team'. It has four radio button options: 'No Team', 'Join an Existing Team', 'Create New Team', and 'Bring back a team from a previous event'. The 'Bring back a team from a previous event' option is selected. Below this is a 'Search Previous Teams' section with a text input field for 'Team name:' and a 'Search' button. Below that is a 'Search Results' section with a text input field for 'Team name:' and a 'Search' button. At the bottom are 'Next' and 'Cancel' buttons.



Answer Questions:

If additional questions were added to the registration for they will appear here. Some questions may be mandatory and will be indicated with a star.

- Complete the questions if the information has been provided.

Confirm Details:

Review the information to confirm it's all correct.

- Enter the Fee Paid amount
- Enter the Additional Gift, if provided.
- Select Cash
- Click Finish

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Customer Service > Manage Participants > Registration Summary | Daffodil Dash - Columbia Valley 2016

1. Enter Details
2. Select Participation Type
3. Create Team
4. Answer Questions
5. **Confirm Details**

Name:	Amanda Oldershaw
Email:	
Username	aoldershaw37226288
Participation Type:	Adult
Registration Type:	Offline
Fundraising Goal:	\$0.00
Registration Status:	Active
Personal Page:	Public

* 1. Fee Paid:
Defines the monetary amount of a fee paid for registration
\$30.00 **Ensure the Fee Paid amount is correct**

2. Additional Gift:
Defines the monetary amount the participant wants to include as an extra gift in addition to the registration fees
\$0.00 **Add an additional gift amount if provided**

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

Finish or Cancel

If any information was forgotten, use the left hand navigation menu to move around to the different screens. Always click next or finish to save your changes.

A registration confirmation email will be automatically generated and sent if an email address was provided, or already existed on the selected record.