



Move a Donation (Changing a Soft Credit)

When a donor makes a gift it can be credited to a few different places – the Event, a Team or a Participant. The credit is known as a Soft Credit. The soft credit on a gift can only be changed on a gift that was made online. Gifts that were entered offline must be deleted and re-entered manually (see Note below).

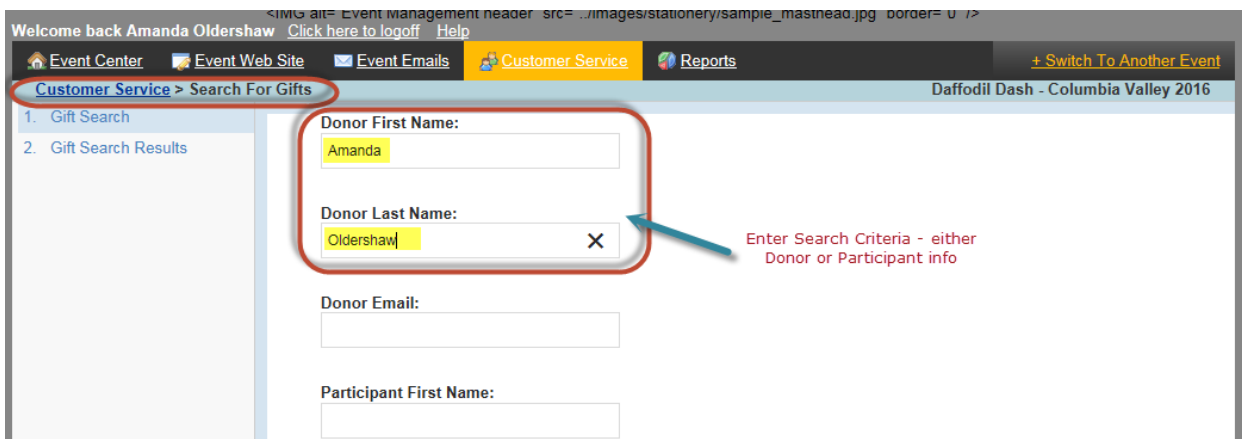
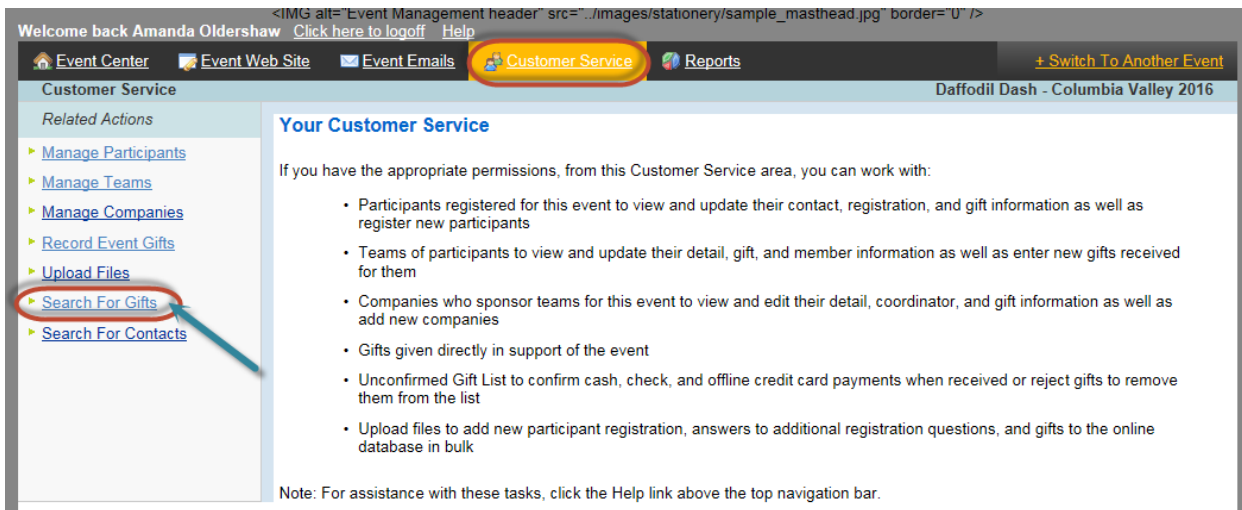
In this procedure the following example will be demonstrated.

A donor calls in to the office and says she made a donation online to the Daffodil Dash but her gift is not showing on her friend Janis’s personal page. Can you please help?

The Donor’s name is Amanda Oldershaw and the friend/participant name is Janis McKell.

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

- Click on the **Customer Service** tab.
- Click **Search for Gifts**, under the Related Actions menu.
- Enter the **Search Criteria** available (Donor Name or Participant Name etc.).
- Click **Next**.





Move a Donation (Changing a Soft Credit)

- Click **Change Soft Credit**, under the Action Column.
- Select what category the gift will be credited to. (a participant, a team or the Event).
- Click **Search for Recipient**.
- Enter the **Participant's Name** and/or **email**.
- Click **Next**.

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Event Center Event Web Site Event Emails Customer Service Reports + Switch To Another Event

Customer Service > Search For Gifts Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

This is a list of transactions for this TeamRaiser in pages of 20 records per page, and contains either all transactions or only the transactions returned from the last search performed.

Records 1 - 1 of 1 First Previous Next Last

Donor Info	Action	Participant Info	Date	Gift Type	Donation Type	Amount	Confirmation Code
Oldershaw, Amanda oldershaw@bc.cancer.ca	View/Edit Change Soft Credit	Norah's Granny Nanny's	2-Jun-2016 2:47:42 PM	Online (Credit card)	Donation	\$10.00	1684-24901-1-5275627-5500652

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Event Center Event Web Site Event Emails Customer Service Reports + Switch To Another Event

Customer Service > Search For Gifts > Change Soft Credit Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

a. Select Type

* 1. New Soft Credit Recipient

Determines the type of TeamRaiser entity who will get credit for this gift

TeamRaiser Participant

TeamRaiser Team

TeamRaiser Event

Select where the gift will be credited to.
For this example the gift will be credited to Janis who is a Participant.

2. Select Recipient:

Displays either the Participant Search page for locating the new participant recipient; the Teams List for selecting the appropriate team; or the Confirm changes page if TeamRaiser Event is selected as the new recipient.

Search for Recipient

Cancel

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Event Center Event Web Site Event Emails Customer Service Reports + Switch To Another Event

Customer Service > Search For Gifts > Change Soft Credit to TeamRaiser Participant Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

a. Select Type

b. Search Criteria

c. Select Destination Participant

d. Confirm Changes

Enter at least one search term for the participant:

You can search for participants by using one or more of the fields below.

First name:
Janis

Last name:
McKel

Email:

Next or Cancel

Enter the Participant's name or email



- Find the correct Participant in the search results list. If no results appear, try searching by first name only or last name only.
- Click **Select**, under the Action column.
- **Review** the information to confirm the details.
- Click **Finish**.

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[Customer Service](#) > [Search For Gifts](#) > [Change Soft Credit to TeamRaiser Participant](#) Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

- a. Select Type
- b. Search Criteria
- c. Select Destination Participant
- d. Confirm Changes

Select the TeamRaiser Participant that you would like to credit with this gift

Use the list and search window to locate the TeamRaiser Participant that you would like to credit with this gift. The search terms can include the participant name and the participant email address.

Participant List

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Name	Action	Email	Event Name
McKell, Janis	Select	jmckell@bc.cancer.ca	Daff_Dash_BC_SIR_Columbia_Valley_2016

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[Customer Service](#) > [Search For Gifts](#) > [Change Soft Credit to TeamRaiser Participant](#) Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

- a. Select Type
- b. Search Criteria
- c. Select Destination Participant
- d. Confirm Changes

Confirm that soft credit for this gift will be reassigned correctly.

If the following information is not correct, return to the previous page to make the necessary changes.

Existing Donation

Billing name: Ms. Amanda Oldershaw
Constituent Name: Ms. Amanda Oldershaw
Transaction date: June 2, 2016
Transaction Amount: \$10.00
Confirmation Code: 1684-24901-1-5275627-5500652

Transaction Confirmation

- Remove this credit from TeamRaiser team Norah's Granny Nanny's in TeamRaiser event Daff_Dash_BC_SIR_Columbia_Valley_2016.
- Assign this credit directly to TeamRaiser participant Janis McKell in TeamRaiser event Daff_Dash_BC_SIR_Columbia_Valley_2016.

or



- Verify that the gift is now credited to the correct Participant by looking at the Participant Info column.

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Event Center Event Web Site Event Emails Customer Service Reports Switch To Another Event

Customer Service > Search For Gifts Daffodil Dash - Columbia Valley 2016

1. Gift Search

2. Gift Search Results

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The Gift is now soft credited to Janis McKell and will appear on her personal page.

Donor Info	Action	Participant Info	Date	Gift Type	Donation Type	Amount	Confirmation Code
Oldershaw, Amanda aoldershaw@bc.cancer.ca	View/Edit Change Soft Credit	McKell, Janis jmckell@bc.cancer.ca	2-Jun-2016 2:47:42 PM	Online (Credit card)	Donation	\$10.00	1684-24901-1-5275627-5500652

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. 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.

