Chapter 6: Customer Service – Manage Participants

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**Search for Participants**

1. From the EMC, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions, select **Manage Participants**.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
a. To search for a participant, enter first name, last name, and/or email address in the search fields before clicking Finish.

**TIP:** Use % for wildcard. Example: *Jon%* if you are trying to find Jon or Jonathon.

4. Beside the participant’s account, click **Manage Participant** to access the participant’s profile.
View a Participant’s Gift History

1. From the EMC click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant’s account, click **Manage Participant** to access the participant’s profile.

5. On the participant’s account record, scroll to the bottom of the page. View the **Gift History** section.

Within the participant’s gift list, you can change the honor roll name, gift soft credit, or refund the donation. See Chapter 9: Manage Gifts for detailed steps.

Edit the Registration Information of a Participant

**Update a Participant’s Basic Registration Information**

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant’s account, click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Edit Registration**.

If you have any questions, please open a support ticket at helpme.cancer.org
a. Make changes to the individual’s online registration as needed:
   i. Update the individual’s **participation type** from the drop down.
   ii. Change the participant’s individual **fundraising goal**.
   iii. Add **emergency contact** information
   iv. Click **Next**.

b. Edit the **registration responses**. Click **Next**.
c. If an offline registration fee was provided, record the payment. Click Finish.
Delete a Participant’s Online Registration

When you deactivate a participant:
- The participant will be removed from the group of participants for this event.
- The participant will be removed from the list of pending autoresponders for this event.
- The participant will not be displayed in search results when donors, people who want to join their team and other site visitors perform searches.
- The participant cannot log into the Dashboard nor access their Personal Page.

Before making the participant inactive or deleting the registration, you must make sure that the individual is not a Team Captain. If the individual is a team captain, you must follow the steps below before successfully removing the online registration:

- Assign a new team member to the captain position
- Remove the initial team captain from all teams

1. From the EMC, click Customer Service.
2. Under Related Actions, select Manage Participants.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
4. Beside the participant’s account, click Manage Participant to access the participant’s profile.
5. From within the participant record, under Related Actions (left hand side of the page), click Make Inactive.
6. Click Make Inactive to deactivate the participant’s registration.
7. Once you have made a contact inactive, the Delete Registration option will appear under the Related Actions sidebar.

If you have any questions, please open a support ticket at helpme.cancer.org
8. Follow the steps to complete the deletion process. The participant will no longer be registered.

**Make a Participant’s Registration Private**

*Note: Making a participant’s registration private prevents donations from being made and site users will not be able to search for the participant.*

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Participants, and search for the participant record.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click Manage Participant to access the participant’s profile.

5. From the participant record, under Related Actions (left hand side of the page), click Make Private.


*If you have any questions, please open a support ticket at helpme.cancer.org*
7. The record will reflect this update.

Edit the Team Information of a Participant

**Move a Participant to a Team**

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Change Team**.

*If you have any questions, please open a support ticket at helpme.cancer.org*
6. Select the new team from the list, or use the **Search** feature to locate it easily.

7. Click **Select** next to the correct team name. Then confirm by clicking **Finish**.

**Create a New Team with a Participant as Team Captain**

1. From the EMC, click **Customer Service**.

2. Under **Related Actions**, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Create New Team**.

6. Enter the new **Team Name**, **Goal**, and Choose a **Company** (if necessary).

*If you have any questions, please open a support ticket at helpme.cancer.org*
7. Click **Finish** to save changes. This participant will now be the captain of the new team.

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### Promote or Demote Team Members and Team Captains

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions**, click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
   a. Click **Finish** to save.

6. For “Team Captains” you wish to demote to Team Member Status:
   a. Begin by promoting a new team captain by clicking the **Promote to Captain** link on the left hand side under Related Actions within the record of the participant who is becoming the new leader.
   b. Once a new participant has been promoted to Team Captain level, the initial leader will automatically be demoted. This change will take a few moments to update to all areas of the Event Management Center and the front-end of your website.

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