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.

   If you have any questions, please open an event support case
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.

If you have any questions, please open an **event support case**.
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.

   a. Make changes to the individual’s online registration as needed:

If you have any questions, please open an event support case.
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**.

*If you have any questions, please open an **event support case**.*
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.

If you have any questions, please open an **event support case**.
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 side bar.

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**.

   *If you have any questions, please open an [event support case](#)*
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.

![Manage Participant button highlighted](image1.png)

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

![Related Actions menu with Make Private highlighted](image2.png)

6. Select **Make Private**.

![Make this registration private](image3.png)

7. The record will reflect this update.

![Participant record with Personal Page set to Private](image4.png)

*If you have any questions, please open an event support case*
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**.
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.

*If you have any questions, please open an event support case*
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).

7. Click Finish to save changes. This participant will now be the captain of the new team.

**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.

*If you have any questions, please open an event support case*
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.

*If you have any questions, please open an event support case*