

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.

The screenshot shows the 'Customer Service' page with a yellow box around the 'Customer Service' tab in the top navigation bar. A red box highlights the 'Manage Participants' link under 'Related Actions' on both the left sidebar and the main content area. Below this, a search bar is circled in red, and a table of participant names, actions, emails, and TeamRaiser names is shown.

Name	Action	Email	TeamRaiser Name
Beane, Billy	Manage Participant	b.beane@as.com	RFL CY15 Hope City
Brady, Jen	Manage Participant	jennifer.brady@cancer.org	RFL CY15 Hope City
Brown, Joe	Manage Participant	jb@12yahoo.com	RFL CY15 Hope City
Catherton, Cathy	Manage Participant	cathy@email.com	RFL CY15 Hope City
Coyote, Wylie	Manage Participant	wylie.c@wb.com	RFL CY15 Hope City
Daugherty, Stephanie	Manage Participant	thespamaven@ca.rr.com	RFL CY15 Hope City
Davis, Sammy	Manage Participant	sammyd@hotmail.com	RFL CY15 Hope City
Dee, Sweet	Manage Participant	swdee@email.com	RFL CY15 Hope City
Dog, Mad	Manage Participant	oscar.gonzo@cancer.org	RFL CY15 Hope City

- 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](#)

Customer Service > Manage Participants > Search for Participants

1. Participant Details	First Name: <input type="text"/> Last Name: <input type="text"/> Email: <input type="text"/>
<input type="button" value="Finish"/> or Cancel	

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

- Beside the participant's account, click **Manage Participant** to access the participant's profile.

Customer Service > Manage Participants Relay For Life of Hope City

Search for Participants	Show All Participants		
This is a list of participants registered for this TeamRaiser arranged in alphabetical order in pages of 20 records per page, and contains either all registered participants or only the participants returned from the last search performed.			
Records 1 - 1 of 1 First Previous Next Last			
Name	Action	Email	TeamRaiser Name
Johnson, Jane	Manage Participant	jj@aol.com	RFL CY15 Hope City
Records 1 - 1 of 1 First Previous Next Last			

View a Participant's Gift History

- From the EMC click **Customer Service**.
- Under Related Actions, select **Manage Participants**.
- A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
- Beside the participant's account, click **Manage Participant** to access the participant's profile.
- On the participant's account record, scroll to the bottom of the page. View the **Gift History** section.

Customer Service > Manage Participants > Manage Participant Relay For Life of Hope City

Related Actions <ul style="list-style-type: none"> Record Donation Edit Contact Information Edit Registration Make Inactive Remove From All Teams Make Private Create New Team Change Team Edit Pages 	This is a summary that shows the contact, registration, Personal Page, team, and fundraising information for the selected participant and the tools that you can use to work with this information.																														
<table border="1"> <tr> <td style="width: 30%;">Name:</td> <td>Princess Leia Solo</td> </tr> <tr> <td>Email:</td> <td>princessleia@theforce.com</td> </tr> <tr> <td>Username:</td> <td>princessleia@theforce.com</td> </tr> <tr> <td>Participation Type:</td> <td>Yes, I want to sign up to fundraise online!</td> </tr> <tr> <td>Registration Type:</td> <td>Online</td> </tr> <tr> <td>Fundraising Goal:</td> <td>\$100.00</td> </tr> <tr> <td>Registration Status:</td> <td>Active</td> </tr> <tr> <td>Personal Page:</td> <td>Public</td> </tr> <tr> <td>Team Name:</td> <td>Test Team</td> </tr> <tr> <td>Team Rank:</td> <td>Captain</td> </tr> </table>		Name:	Princess Leia Solo	Email:	princessleia@theforce.com	Username:	princessleia@theforce.com	Participation Type:	Yes, I want to sign up to fundraise online!	Registration Type:	Online	Fundraising Goal:	\$100.00	Registration Status:	Active	Personal Page:	Public	Team Name:	Test Team	Team Rank:	Captain										
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Records 1 - 4 of 4 First Previous Next Last																															
<table border="1"> <thead> <tr> <th>Name</th> <th>Action</th> <th>Gift Type</th> <th>Donation Type</th> <th>Gift Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Test1 Donation</td> <td>View/Edit Change Soft Credit</td> <td>Offline Confirmed (Cash)</td> <td>Gift</td> <td>11/07/2014</td> <td>\$100.00</td> </tr> <tr> <td>Test2 Donation</td> <td>View/Edit Change Soft Credit</td> <td>Offline Confirmed (Cash)</td> <td>Gift</td> <td>11/07/2014</td> <td>\$25.00</td> </tr> <tr> <td>Michael Jordan</td> <td>View/Edit Change Soft Credit</td> <td>Offline Confirmed (Cash)</td> <td>Gift</td> <td>11/13/2014</td> <td>\$200.00</td> </tr> <tr> <td>Darth Vader</td> <td>View/Edit Change Soft Credit</td> <td>Offline Confirmed (Cash)</td> <td>Gift</td> <td>11/13/2014</td> <td>\$25.00</td> </tr> </tbody> </table>		Name	Action	Gift Type	Donation Type	Gift Date	Amount	Test1 Donation	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	11/07/2014	\$100.00	Test2 Donation	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	11/07/2014	\$25.00	Michael Jordan	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	11/13/2014	\$200.00	Darth Vader	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	11/13/2014	\$25.00
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Darth Vader	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	11/13/2014	\$25.00																										
Records 1 - 4 of 4 First Previous Next Last																															

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.

Name	Action	Email	TeamRaiser Name
Solo, Princess Leia	Manage Participant	princessleia@theforce.com	RFL CY15 National Community BP

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

This screenshot shows the 'Customer Service > Manage Participants > Manage Participant' page. On the left, there is a sidebar titled 'Related Actions' with several options: Record Donation, Edit Contact Information, **Edit Registration** (which is circled in red), Remove From All Teams, Make Private, Create New Team, Change Team, and Edit Pages. The main content area displays the participant's information: Name (Princess Leia Solo), Email (princessleia@theforce.com), Username (princessleia@theforce.com), Participation Type (Yes, I want to sign up to fundraise online!), Registration Type (Online), Fundraising Goal (\$100.00), Registration Status (Active), Personal Page (Public), Team Name (Test Team), and Team Rank (Captain). Below this, there is a section titled 'Gift History' with a table showing four entries:

Name	Action	Gift Type	Donation Type	Gift Date	Amount
Test1 Donation	View/Edit Confirm Reject	Offline Unconfirmed (Cash)	Gift	11/07/2014	\$100.00
Test2 Donation	View/Edit Confirm Reject	Offline Unconfirmed (Cash)	Gift	11/07/2014	\$25.00
Michael Jordan	View/Edit Confirm Reject	Offline Unconfirmed (Cash)	Gift	11/13/2014	\$200.00
Darth Vader	View/Edit Confirm Reject	Offline Unconfirmed (Cash)	Gift	11/13/2014	\$25.00

- 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**.

Customer Service > Manage Participants > Manage Participant > Edit Registration Responses

1. Participation Type:
Identifies the way in which this person will participate in this TeamRaiser
 Yes, I want to sign up to fundraise online! ▾

2. Fundraising Goal:
Defines the amount of money this participant intends to raise
 \$100.00

3. Emergency Contact:
Identifies the name of the person to contact in case of an emergency

4. Emergency Phone:
Defines the phone number to call in case of an emergency

Next or [Cancel](#)

- b. Edit the **registration responses**. Click **Next**.

Customer Service > Manage Participants > Manage Participant > Edit Registration Responses

1. Edit Registration

2. Edit Registration Responses

*1. Please select all that describe your experience with cancer.
Please make between 1 and 5 selections from the choices below.

I have or had cancer
 Caregiver for someone who has/had cancer
 My relative has/had cancer
 My friend has/had cancer
 Other

2. My most recent type of diagnosis:
 Please select response ▾

3. My date of diagnosis:
Month Day Year
 Month ▾ Day ▾ Year ▾

4. Select the option that best describes your role:
 Please select response ▾

*5. T-shirt size (Size availability may vary by event, and t-shirts are awarded to those who raise a \$100 minimum):
 S ▾

*6. Indicate your team's affiliation:
 ACS Office ▾

*7. Has your team participated in this event in prior years?
 No ▾

*8. Is your team made up mostly of students?
 No ▾

Finish or [Cancel](#)

- c. If an offline registration fee was provided, **record the payment**. Click **Finish**.

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

Customer Service > Manage Participants > Manage Participant > Record Registration Fees Received Relay For Life of Hope City

1. Edit Registration 2. Edit Registration Responses 3. Record Fees Received	1. Registration Fees Registration fees for the participation type selected by this participant only. Does not include family registrations registration fee amounts. \$10.00
	2. Discount Amount Amount that will be applied to this participant's registration fees. Does not include family registrations discount amounts. \$0.00
	3. Total Fees Owed Amount owed by this participant. Includes registration fees minus any discounts that were used for this participant and any family registrations that they may have entered while registering. \$10.00
	4. Additional Gift Handling The following additional gift given during registration will be converted to a donation soft credited to the participant. This does not affect status indicators. \$0.00
	5. Record Payment Received Enter the payment method used to pay the registration fee, or cancel to leave as unpaid. If the participant paid more than their registration fees, please enter the extra amount as an offline gift. Note that once you confirm these fees as received, you will not be able to undo or edit the registration fees.
	<input checked="" type="radio"/> Cash <input type="radio"/> Check
	Finish or Cancel

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.

- Beside the participant's account, click **Manage Participant** to access the participant's profile.
- From within the participant record, under **Related Actions** (left hand side of the page), click **Make Inactive**.

- Click **Make Inactive** to deactivate the participant's registration.

Customer Service > Manage Participants > Manage Participant

Related Actions

- ▶ [Record Donation](#)
- ▶ [Edit Contact Information](#)
- ▶ [Edit Registration](#)
- ▶ [Make Inactive](#)
- ▶ [Remove From All Teams](#)
- ▶ [Make Private](#)
- ▶ [Create New Team](#)
- ▶ [Change Team](#)
- ▶ [Promote to Captain](#)
- ▶ [Promote to Co-Captain](#)
- ▶ [Edit Pages](#)

This is a summary that shows the contact, registration, Personal Page work with this information.

Name:	Sally Jobs_Test
Email:	agutierrez+test@convio.com
Username:	agtest73
Participation Type:	Survivor Lap Registration Only
Registration Type:	Offline
Fundraising Goal:	\$0.00
Registration Status:	Active
Personal Page:	Public
Team Name:	Agustin's Team
Team Rank:	Member
Company Name:	Aperture Science

Customer Service > Manage Participants > Manage Participant > Make Inactive

Relay For Life of Hope City

1. Make Inactive

Make this Participation Registration Inactive

If you make this registration inactive, the following will occur:

- This participant will be removed from the group of participants for this event.
- This participant will be removed from the list of pending autoresponders for this event.
- This participant will not be displayed in search results when donors, people who want to join their team, and other site visitors perform searches.
- This participant cannot log into the Participant Center and access their Personal Page.

Make Inactive [Cancel]

- Once you have made a contact inactive, the **Delete Registration** option will appear under the Related Actions sidebar.

Customer Service > Manage Participants > Manage Participant

Related Actions

- ▶ [Record Donation](#)
- ▶ [Edit Contact Information](#)
- ▶ [Edit Registration](#)
- ▶ [Make Active](#)
- ▶ [Delete Registration](#)
- ▶ [Remove From All Teams](#)
- ▶ [Make Private](#)
- ▶ [Create New Team](#)
- ▶ [Change Team](#)
- ▶ [Promote to Captain](#)
- ▶ [Promote to Co-Captain](#)
- ▶ [Edit Pages](#)

This is a summary that shows the contact, registration, Personal Page, work with this information.

Name:	Sally Jobs_Test
Email:	agutierrez+test@convio.com
Username:	agtest73
Participation Type:	Survivor Lap Registration Only
Registration Type:	Offline
Fundraising Goal:	\$0.00
Registration Status:	Inactive
Personal Page:	Public
Team Name:	Agustin's Team
Team Rank:	Member
Company Name:	Aperture Science

- 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.

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

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

- Under Related Actions, select **Manage Participants**, and search for the participant record.
- A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
- Click **Manage Participant** to access the participant's profile.

Name	Action	Email	TeamRaiser Name
Smiley, SueTest	Manage Participant	ssmiley@test.com	RFL CY15 National Community BP

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

Customer Service > Manage Participants > Manage Participant

Related Actions																					
<ul style="list-style-type: none"> ▶ Record Donation ▶ Edit Contact Information ▶ Edit Registration ▶ Make Inactive ▶ Remove From All Teams ▶ Make Private ▶ Create New Team ▶ Change Team ▶ Promote to Captain ▶ Promote to Co-Captain ▶ Edit Pages 	<p>This is a summary that shows the contact, registration, Personal Page, team, and fundraising work with this information.</p> <table border="1"> <tr> <td>Name:</td> <td>SueTest Smiley</td> </tr> <tr> <td>Email:</td> <td>ssmiley@test.com</td> </tr> <tr> <td>Username:</td> <td>ssmiley@test.com</td> </tr> <tr> <td>Participation Type:</td> <td>Yes, I want to sign up to fundraise online!</td> </tr> <tr> <td>Registration Type:</td> <td>Online</td> </tr> <tr> <td>Fundraising Goal:</td> <td>\$100.00</td> </tr> <tr> <td>Registration Status:</td> <td>Active</td> </tr> <tr> <td>Personal Page:</td> <td>Public</td> </tr> <tr> <td>Team Name:</td> <td>Team Hope</td> </tr> <tr> <td>Team Rank:</td> <td>Member</td> </tr> </table>	Name:	SueTest Smiley	Email:	ssmiley@test.com	Username:	ssmiley@test.com	Participation Type:	Yes, I want to sign up to fundraise online!	Registration Type:	Online	Fundraising Goal:	\$100.00	Registration Status:	Active	Personal Page:	Public	Team Name:	Team Hope	Team Rank:	Member
Name:	SueTest Smiley																				
Email:	ssmiley@test.com																				
Username:	ssmiley@test.com																				
Participation Type:	Yes, I want to sign up to fundraise online!																				
Registration Type:	Online																				
Fundraising Goal:	\$100.00																				
Registration Status:	Active																				
Personal Page:	Public																				
Team Name:	Team Hope																				
Team Rank:	Member																				

- Select **Make Private**.

Customer Service > Manage Participants > Manage Participant > Make Private

1. Make Private

Make this registration private

If you make this registration private, site users will NOT be able to search for this participant.

Make Private [Cancel](#)

- The record will reflect this update.

Name:	SueTest Smiley
Email:	ssmiley@test.com
Username:	ssmiley@test.com
Participation Type:	Yes, I want to sign up to fundraise online!
Registration Type:	Online
Fundraising Goal:	\$100.00
Registration Status:	Active
Personal Page:	Private
Team Name:	Team Hope
Team Rank:	Member

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.

Name	Action	Email	TeamRaiser Name
Jones, Bear	Manage Participant	bear@email.com	RFL CY15 Hope City

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

Customer Service > Manage Participants > Manage Participant

Related Actions	Summary																
<ul style="list-style-type: none">▶ Record Donation▶ Edit Contact Information▶ Edit Registration▶ Make Inactive▶ Make Private▶ Create New Team▶ Change Team▶ Edit Pages	<p>This is a summary that shows the contact, registration, Personal Page, team, and fundraising info work with this information.</p> <table><tr><td>Name:</td><td>Bear Jones</td></tr><tr><td>Email:</td><td>bear@email.com</td></tr><tr><td>Username:</td><td>bearbear5656</td></tr><tr><td>Participation Type:</td><td>Team Captain Registration (Pay by Cash or Check)</td></tr><tr><td>Registration Type:</td><td>Online</td></tr><tr><td>Fundraising Goal:</td><td>\$500.00</td></tr><tr><td>Registration Status:</td><td>Active</td></tr><tr><td>Personal Page:</td><td>Public</td></tr></table>	Name:	Bear Jones	Email:	bear@email.com	Username:	bearbear5656	Participation Type:	Team Captain Registration (Pay by Cash or Check)	Registration Type:	Online	Fundraising Goal:	\$500.00	Registration Status:	Active	Personal Page:	Public
Name:	Bear Jones																
Email:	bear@email.com																
Username:	bearbear5656																
Participation Type:	Team Captain Registration (Pay by Cash or Check)																
Registration Type:	Online																
Fundraising Goal:	\$500.00																
Registration Status:	Active																
Personal Page:	Public																

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.

Name	Action	Email	TeamRaiser Name
Solo, Princess Leia	Manage Participant	princessleia@theforce.com	RFL CY15 National Community BP

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

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

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

1. Enter Details

1. Team Name:
Identifies the team

2. Team Goal:
Defines the amount of money the team intends to raise (which the Team Captain can update later in the Participant Center)

3. Team Company:
Identifies the company associated with or sponsoring this team
 Choose an existing value
 Enter a new company

Finish or [Cancel](#)

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

Promote or Demote Team Members and Team Captains

- From the EMC, click **Customer Service**.
- Under Related Actions, select **Manage Participants**.
- A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
- Click **Manage Participant** to access the participant's profile.
- From the participant record, under **Related Actions**, click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
 - Click **Finish** to save.

This is a summary that shows the contact, registration, Personal Page, team, and the tools that you can use to work with this information.

Name:	Jumping Joe
Email:	joe@jumping.com
Username:	jumpingoelasdfds
Participation Type:	Team Captain Registration (Pay by Cash or Check)
Registration Type:	Online
Fundraising Goal:	\$100.00
Registration Status:	Active
Personal Page:	Public
Team Name:	JUMPING
Team Rank:	Member

6. For “Team Captains” you wish to demote to Team Member Status:

- 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.
- 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.