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Search for Gifts

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

2. Under Related Actions, select **Search for Gifts**.
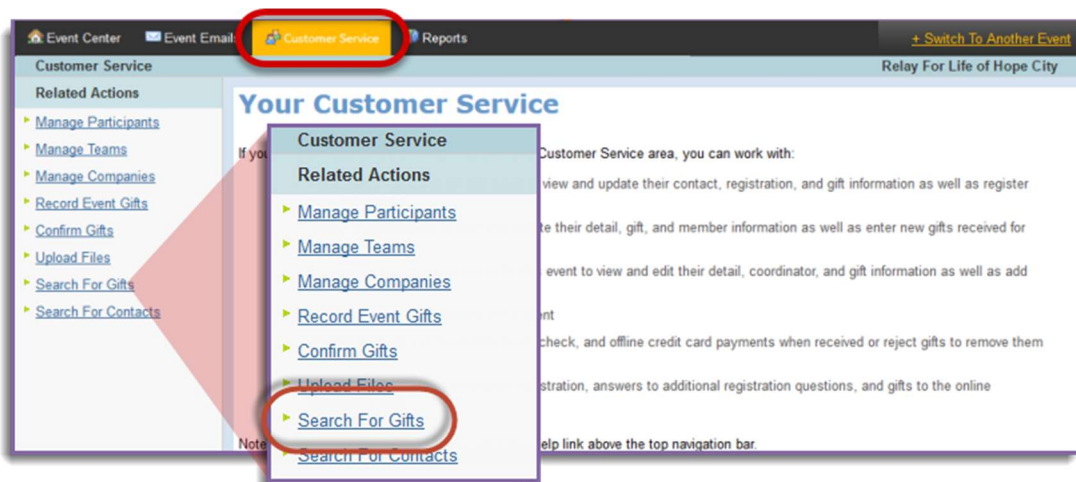
3. Enter any information you know about the donor and/or donation, including:
   a. Donor's first / last name or email address
   b. Participant's name who the donation is credited to
   c. Confirmation code of the donation as listed on the gift receipt
   d. Value of the donation
   e. When the gift was made online
   f. Use % for wildcard. Example: Jon% if you are trying to find Jon or Jonathon

4. Click **Finish** to perform the search.

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

Enter Offline Donations Received

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

2. Under Related Actions on the left side of the page, click *Manage Teams*, *Manage Participant* or *Record Event Gifts*, depending on how the gift should be credited.
   a. If you are crediting it to a team or a participant, the next step will be to search for your team or participant name and click 'Manage' in the action column.
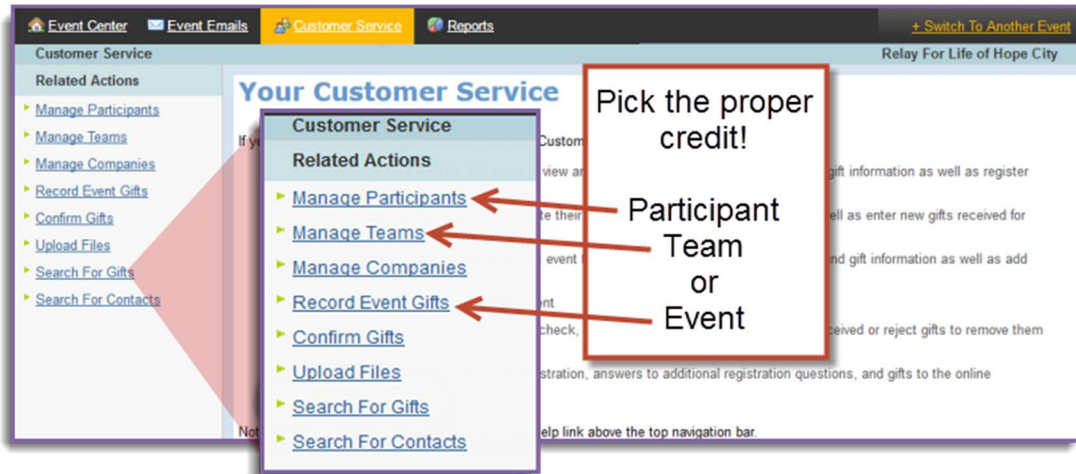
3. Under Related Actions on the left side of the page, click *Record (Team, Participant or Event) Donation*.

4. For Step 1 – **Enter Donor Information**, enter the donor's personal information. Only name is required.

5. Click 'Next'

NOTE: Upon clicking Next, you may see this screen.

If the donor has previously interacted <u>online</u> with an American Cancer Society event, the system will match the participant details you entered with an existing record.

Verify the donor details against the existing record(s), select the correct record and move on by clicking Next

If this is a brand new constituent who has never registered online for an American Cancer Society event, or if you are not positive that one of the displayed options is a match, you can create a new constituent and move on by clicking Next.
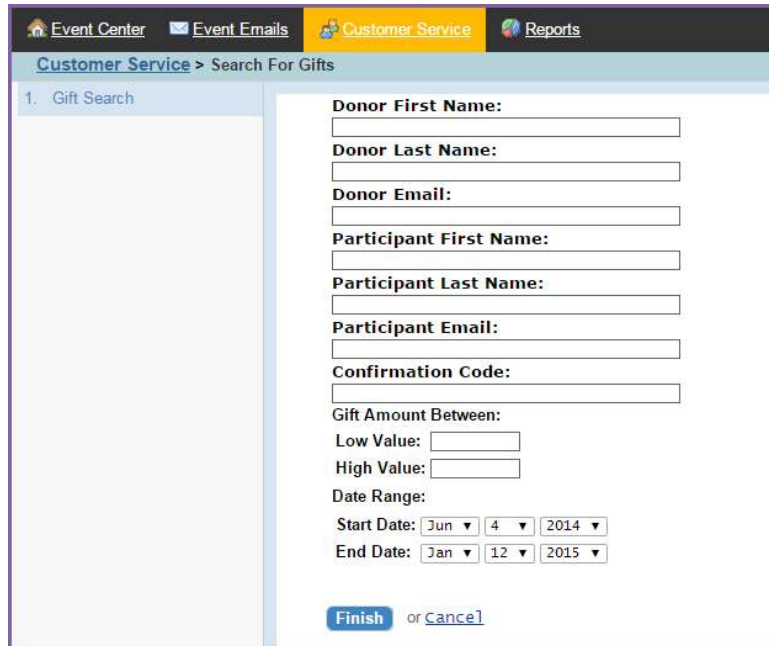
6. For Step 2 – **Configure Gift**, specify the following:
   a. Gift Type – defaulted to one time gift
   b. Gift Amount – enter the monetary amount of the single payment or of each payment to be received for the sponsorship level
   c. Do Not Display Amount – check this box if the amount is not to be displayed
   d. Recognition Name – enter the recognition name if it is different than the name on the billing information. Enter "Anonymous" if the donor does not want their name displayed.
   e. Batch ID – enter a value to identify groups of donations processed at the same time
   f. Payment Method – select the method of payment:
      i. *Cash*
      ii. *Check* – if you select check, an additional field will display to enter the check number
      iii. Payment Status – If you have the donation in hand, select Confirmed

7. Click **Process** or **Process and Add Another** if you have another donation to add to that particular participant, team or event.

If you have any questions, please open an <u>event support case</u>

Change the Honor Roll Name on a Participant's Page

Some donors may choose to be referred to by a different name or to remain anonymous. As the event manager, you may update how the donor and donation is displayed on each participant page.

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

2. Under Related Actions, select **Search for Gifts**.

3. Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

4. Find the donation whose appearance in the Honor Roll you wish to update. Beside the gift record, click the **View/Edit** link.

5. Skip to step **2. Configure Gift**

6. Specify and update the necessary information:
   a. **Do Not Display Amount**: Check the box beside "**Do not display the gift amount**" if the donor does not wish to have his/her donation amount displayed publically on the personal page.
   b. **Recognition Name**: If this field is left blank, the Recognition Name is defaulted to the donor's Name, but you can update the donor's name as s/he wishes it to appear on the Honor Roll. If the donor wishes to remain anonymous, enter "Anonymous" in the field provided.

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

7. Click **Finish** to save changes to the donation's appearance in the Honor Roll.

Move the Credit of a Donation to another Participant or Team

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Search for Gifts**.

3. Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

4. Beside the gift you wish to move, click the **Change Soft Credit** link.

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

5. Identify who will receive credit for the donation. You can adjust the gift credit to a participant, team, or the general event. Click the appropriate **radio button** before clicking **Search for Recipient**.

6. Identify the recipient of the donation through the list provided or through a search. Click **Select** next to the person or team to whom you are reassigning credit for the donation.

7. **Confirm Changes**: Review the transaction information and the change in soft credit before confirming. If it is correct, click **Finish** and the credit of a donation will be moved.

Refund a Donation

If you need to refund and online donation, or change/refund an offline donation, please log a detailed ticket at helpme.cancer.org or call 1-800-227-2345, option 2.

Note: Please do not change an offline gift amount as an attempt to correct a gift, as that will lead to discrepancies between website, mobile app and Facebook fundraiser totals.

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