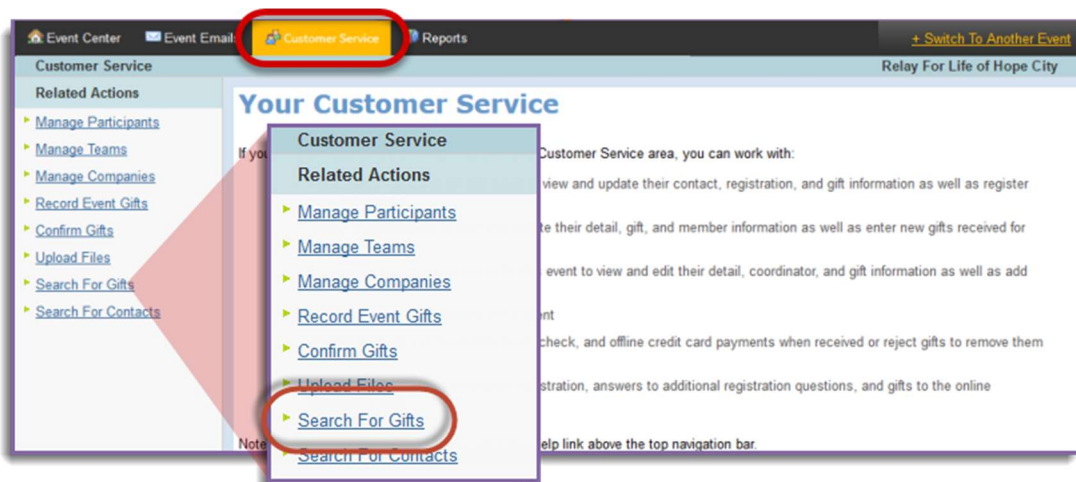


## Chapter 9: Customer Service – Manage Gifts

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- [Change the Honor Roll Scroll on a Participant's page](#)
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### Search for Gifts

1. From the EMC, click **Customer Service**.
2. Under Related Actions, select **Search for Gifts**.

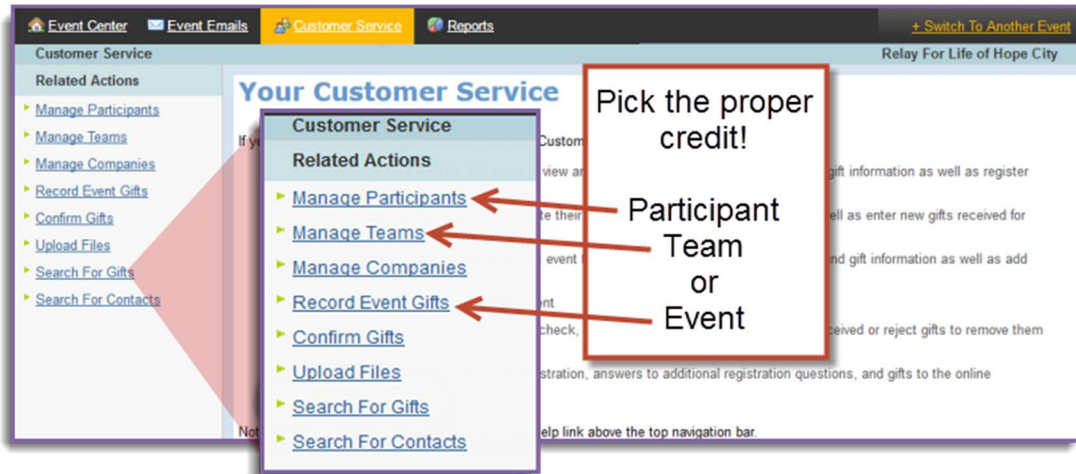


3. Enter any information you know about the donor and/or donation, including:
  - a. Donor's first / last name or email address
  - b. Participant's name who the donation is credited to
  - c. Confirmation code of the donation as listed on the gift receipt
  - d. Value of the donation
  - e. When the 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.

A screenshot of the 'Search For Gifts' form in the EMC. The form is titled 'Customer Service > Search For Gifts' and has a sub-header '1. Gift Search'. It contains several input fields: 'Donor First Name:', 'Donor Last Name:', 'Donor Email:', 'Participant First Name:', 'Participant Last Name:', 'Participant Email:', and 'Confirmation Code:'. Below these is a 'Gift Amount Between:' section with 'Low Value:' and 'High Value:' input fields. The 'Date Range:' section includes 'Start Date:' (Jun 4 2014) and 'End Date:' (Jan 12 2015) dropdown menus. At the bottom, there are 'Finish' and 'Cancel' buttons.

## 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'



Customer Service > Manage Participants > Manage Participant > Amy Delozier

1. Enter Donor Information  
2. Configure Gift

**1. Donor Information:**  
Specifies the Profile information in the constituent record of this participant (Note: If the gift payment will be made with a credit card or bank account withdrawal, the name here must match exactly with the name on the corresponding credit card or bank account.)

Title	First Name	Middle Name	Last Name	Suffix	Professional Suffix
	Michael		Scott		

Address 1:

Address 2:

City:

State / Province:

ZIP / Postal Code:

Country:

Email:

Phone:

of

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

If the donor has previously interacted online 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.

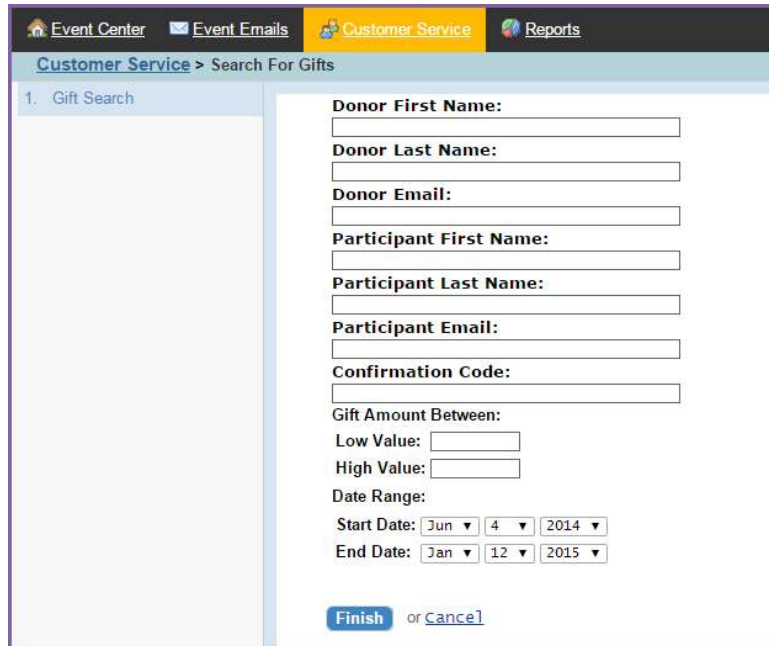
6. For Step 2 – **Configure Gift**, specify the following:
  - a. Gift Type – defaulted to one time gift
  - b. Gift Amount – enter the monetary amount of the single payment or of each payment to be received for the sponsorship level
  - c. Do Not Display Amount – check this box if the amount is not 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.

## 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.



Customer Service > Search For Gifts

1. Gift Search

**Donor First Name:**

**Donor Last Name:**

**Donor Email:**

**Participant First Name:**

**Participant Last Name:**

**Participant Email:**

**Confirmation Code:**

**Gift Amount Between:**  
Low Value:   
High Value:

**Date Range:**  
Start Date: Jun 4 2014  
End Date: Jan 12 2015

[Finish](#) or [Cancel](#)

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

Michael Jordan	<a href="#">View/Edit</a>	Offline Confirmed (Cash) Gift	11/13/2014	\$200.00
Change Sort Credit				

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.

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

Customer Service > Manage Participants > Manage Participant > Amy\_TEST Delozier Relay For Life of Hope City

1. Enter Donor Information

2. Configure Gift

**1. Gift Amount:**  
For a One time gift, enter the amount of the donor's gift. For a Recurring gift, enter the amount of each payment to be collected for this gift.  
\$200.00

**2. Gift Category:**  
Identifies the type of gift received  
[Dropdown]

**3. Do Not Display Amount:**  
Determines if the amount of a gift is displayed in gift lists on the site (Note: The donor name may still be visible.)  
 Do not display the gift amount

**4. Recognition Name:**  
Leave this field blank to display the donor's name as you entered it on the previous page. If the donor requests an alternate name (such as Joey or Our Family) to display on Web pages, enter that name in this field. If the donor requests not to display their name, enter the word Anonymous in this field.  
In memory of Stuart Scott

**5. Batch ID:**  
Groups a set of offline gifts being processed at the same time  
[Text Field]

**6. Payment Method:**  
Click the radio button of the appropriate method by which the gift will be paid or recurring payments will be collected. If you select an option other than cash, additional fields will display for you to complete the payment method.  
 Cash  
 Check

**Process** [Cancel](#)

## Move the Credit of a Donation to another Participant or Team

- From the Event Management Center, click **Customer Service** in the top Navigation Bar.
- Under Related Actions, select **Search for Gifts**.
- Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

Event Center | Event Emails | Customer Service | Reports

Customer Service > Search For Gifts

1. Gift Search

**Donor First Name:** [Text Field]  
**Donor Last Name:** [Text Field]  
**Donor Email:** [Text Field]  
**Participant First Name:** [Text Field]  
**Participant Last Name:** [Text Field]  
**Participant Email:** [Text Field]  
**Confirmation Code:** [Text Field]  
**Gift Amount Between:**  
 Low Value: [Text Field]  
 High Value: [Text Field]  
**Date Range:**  
 Start Date: [Jun] [4] [2014]  
 End Date: [Jan] [12] [2015]

**Finish** or [Cancel](#)

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

Test2 Donation	<a href="#">View/Edit</a>	Offline Confirmed (Cash) Gift	11/07/2014	\$25.00
	<a href="#">Change Soft Credit</a>			

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**.

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

1. 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

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](#)

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.

Name	Action	Email	TeamRaiser Name
Doe_Test, Jane	Select	janedoe@gmail.com	RFL CY15 National Community BP

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](http://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.