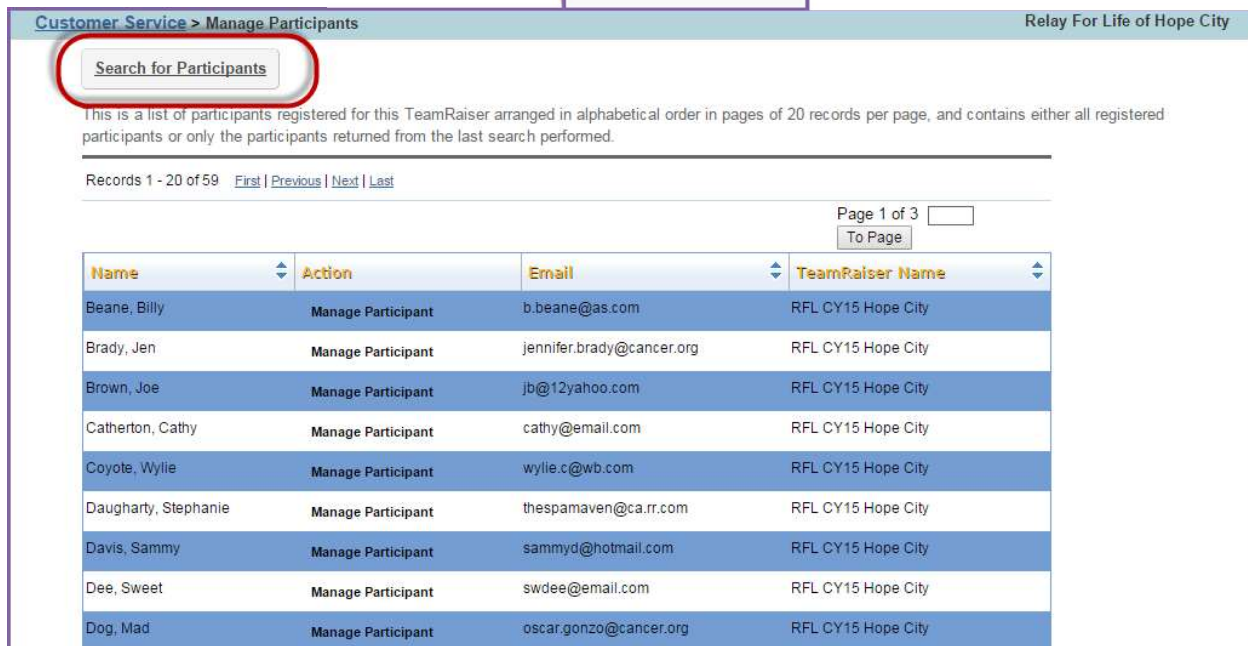
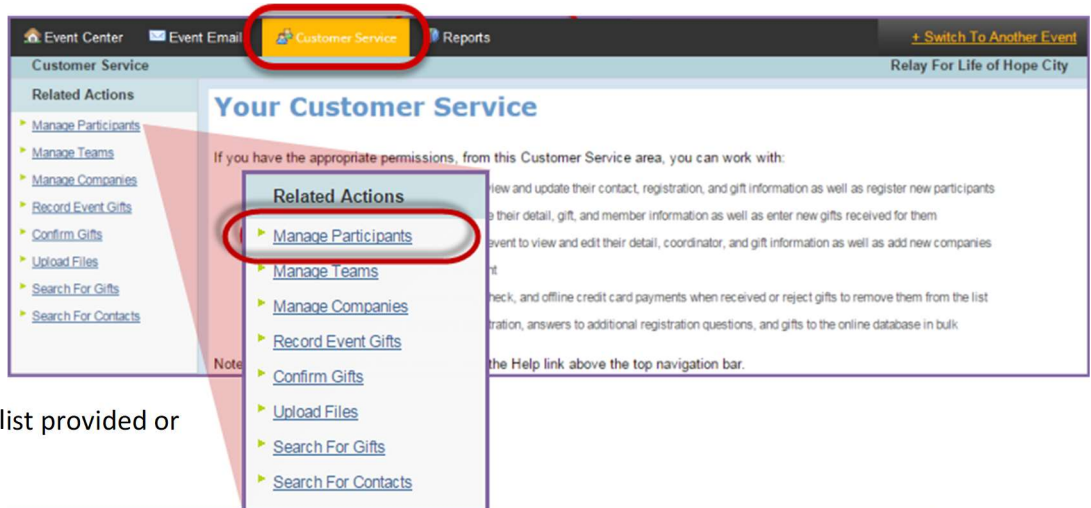


Chapter 6: Customer Service – Manage Participants

- [Search for Participants](#)
- [View a Participant's Gift History](#)
- [Edit the Registration Information of a Participant](#)
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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.

Name	Action	Email	TeamRaiser Name
Johnson, Jane	Manage Participant	jj@aol.com	RFL CY15 Hope City

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.

Gift History

Records 1 - 4 of 4

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

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**.

Related Actions

- Record Donation
- Edit Contact Information
- Edit Registration**
- Remove From All Teams
- Make Private
- Create New Team
- Change Team
- Edit Pages

Participant 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
Team Rank: Captain

Gift History

Records 1 - 4 of 4 [First](#) [Previous](#) [Next](#) [Last](#)

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

Records 1 - 4 of 4 [First](#) [Previous](#) [Next](#) [Last](#)

- 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**.

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Customer Service > Manage Participants > Manage Participant > Edit Registration

1. Edit Registration
2. 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**.

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.**

☒ Cash
 ☐ Check

Finish
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

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 or [Cancel](#)

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

[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](#)

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.

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

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

[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, team, and fundraising work with this information.

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

6. 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 or [cancel](#)

7. 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

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

- ▶ [Record Donation](#)
- ▶ [Edit Contact Information](#)
- ▶ [Edit Registration](#)
- ▶ [Make Inactive](#)
- ▶ [Make Private](#)
- ▶ [Create New Team](#)
- ▶ **Change Team**
- ▶ [Edit Pages](#)

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

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

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

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, team, and fundraising information for this participant.

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:	Member

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

Customer Service > Manage Participants > Manage Participant > Create New Team

Relay For Life of Hope City

1. Enter Details

1. Team Name:
Identifies the team
Jabba's Hutts

2. Team Goal:
Defines the amount of money the team intends to raise (which the Team Captain can update later in the Participant Center)
1,500

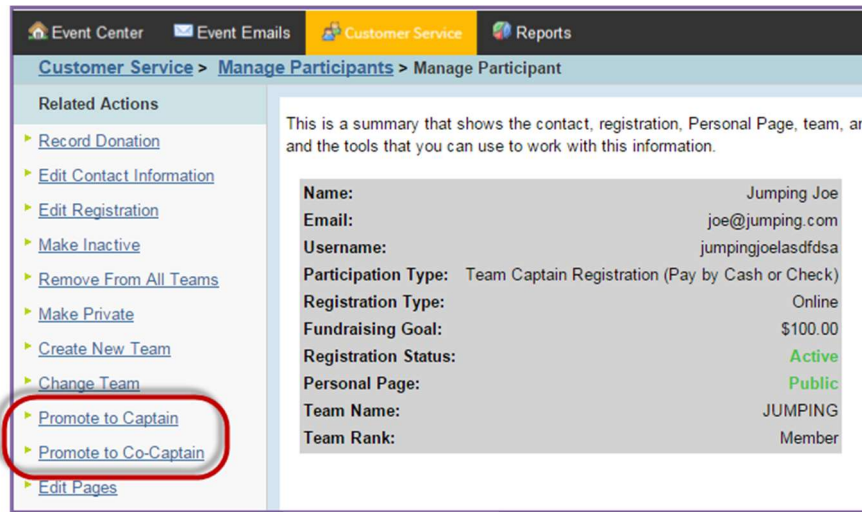
3. Team Company:
Identifies the company associated with or sponsoring this team
Choose an existing value
Enter a new company

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.



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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, team, and the tools that you can use to work with this information.

Name:	Jumping Joe
Email:	joe@jumping.com
Username:	jumpingjoelasdfdsa
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:
 - 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.