Assign Contact ID

Manually entered payments and donations processed using Flipcause LIVE that do not include an email address will automatically be stored as Anonymous records. You can independently assign these transactions and donations to contacts within your database using the steps below.

STEP ONE: Assign the Transaction to a Contact ID

You can link an Anonymous transaction record to an existing Contact Profile in your database by assigning a Contact ID (CID). Note: If you want to link to a supporter who is not yet in your database, you will need to create a new Contact Profile for that individual or business first.

- From the left-side menu, click Reports > Transaction & Activity to view a list of all recent transactions.

- Adjust the date filter as needed and add filter:
  - Filter: First Name
  - Select Parameter: Is blank
  - Values: Yes

- Click Generate Report
Scroll to locate the Anonymous transaction you would like to update. **Take note of the transaction DATE and CAMPAIGN.** You will need this information to complete the assignment in STEP TWO.

- **Click the Details button on the right.**

- From the View Transaction Details window, click the **Assign CID** button at the top right or the Assign CID linked text underneath.

- **Search by CID or Contact Name.**

- **Select the desired record and click Assign to this CID.**
You will receive a popup confirmation once complete

Exit the Transaction Details popup window.

**STEP TWO: Assign the Activity to a Contact ID**

- You will need to return to the Reports area of the Dashboard

- Go to *Reports > Transaction & Activity*

- Choose Report Type = *Donations*

- Since you know the Transaction Date from step 1, you can adjust your date filter to reflect that date:
  - Filter: *Transaction Date*
  - Parameter: *Is equal to*
  - Values: [DATE]

- Then add the filter for a blank name:
  - Filter: *First Name*
  - Select Parameter: *Is blank*
  - Values: Yes

- Click *Generate Report*
- Scroll to locate the donation activity you would like to update and click the **Details** button on the right.

- From the View Donation Details window, click the **Assign CID** button at the top right or the Assign CID linked text underneath.

- Search by CID or Contact Name, select the desired record, and click **Assign to this CID**.
You will receive a popup confirmation once complete:

Reassign CID

You can also reassign the Contact ID (CID) on a particular transaction record to link it to a different Contact Profile in your database. Note: If you want to link to a supporter who is not yet in your database, you will need to create a new Contact Profile for that individual or business first.

STEP ONE: Reassign the Transaction CID

- First you will need to find the transaction you would like to reassign. You can use the Search All Reports function. Go to Reports and use the search box.
- You can select if you would like to search by Full Name, Business Name, First Name, Last Name, Email, or ID.
- Scroll to locate the transaction you would like to reassign. Take note of the current transaction Contact ID and contact name. You will need this information to complete the re-assignment in STEP TWO.
- Click the Details button on the right.
From the View Transaction Details window, click the **Reassign CID** button at the top right.

Search by CID or Contact Name.

Select the desired record and click **Reassign to this CID**.

A popup window will confirm that the change has been processed:

Alternatively, if you already know the Contact Name for the transaction and donation you would like to re-assign:

![View Transaction Details](image)

![Contact Database](image)
- Navigate to **Contacts > Contact Records**.

- Enter the First Name or Contact ID of the contact to whom the transaction was originally assigned and click **Search**.

- Locate the contact in the list of Contact Records and select **View Profile**.

- Scroll down to the Activity History section and select the Transaction record you would like to reassign from the list.

- From the View Transaction Details window, click the **Reassign CID** button at the top right.

- Search for the Contact CID or Contact Name to find the contact to whom the transaction will be reassigned.

- Select the desired record and click **Reassign to this CID**.

- A popup window will confirm that the change has been processed:

**STEP TWO: Reassign the Donation Contact ID**

- Navigate to **Contacts > Contact Records**

- Enter the First Name or Contact ID of the contact to whom the transaction was
originally assigned (from STEP 1.3 above) and click **Search**.

- Scroll down to find the contact in the Contact Records list and select **View Profile**.
- Scroll down to the Activity History section and select the Donation activity you would like to reassign from the list.

![View Donation Details](image)

- From the View Donation Details window, click the **Reassign CID** button at the top right.
- Search for the Contact CID or Contact Name to find the contact to whom the donation will be reassigned.
- Select the desired record and click **Reassign to this CID**.
- A popup window will confirm that the change has been processed: