The Flipcause CRM provides a comprehensive and centralized way for you to view and manage all of a supporter’s activity history and personal details in one place.

From the Contact Database, you’ll be able to better manage stewardship and communications and oversee fundraising efforts. All personal information and transaction data collected through your Flipcause campaigns is automatically synced with your Contact Database, and all supporter activity is aggregated into Contact and Group Profiles.

Contact Records Home

To access the Contact Database, click the Contacts button on the left-hand sidebar. This will lead you to the Contact Records Home.

Contact Records are profiles for individual people and businesses in your database.

From your Contact Records Homepage, you can:

- Manually add a new Contact
- Search Contacts
Filter contacts alphabetically by full name, first/last name, contact ID (CID), or email

- View your total contact records, a visual heatmap of contacts, and number of contacts added by month
- Access Contact Profiles

Contact Profiles

Each Contact Profile is a complete at-a-glance depiction of a Contact (individual or business) in your database.
The Contact Profile is where you can view and edit data about your supporter, including his or her personal details, relationships, activity history, communications history subscriptions, peer pages, notes, custom fields, and more.

Profiles are also a centralized place where you can take actions such as adding custom tags, sending messages, adding new payments, and downloading Annual Reports for each contact.

Contact Tags

You can add any custom Tags to your Contacts and Groups to provide more information on which to sort and filter your database.

You can create a tag from the Tag Manager area by clicking "Add New Tag"
Once created, you'll be able to add tags from the Tags area of your Contact and Group Profiles or Mass Tag multiple contacts/groups.

To add a Tag to an individual contact/group from their Contact/Group record:

- Go to Contacts, View Contact Profile of the person for whom you'd like to assign the tag, and click Add.
- Search for the tag you would like to add. You can begin typing the tag name or scroll through the list.
- Click on the Tag(s) you would like to add to the contact/group then click Assign.
Some tag ideas:

- Major Donor
- Board Member
- Sponsor

You will be able to filter your Contact reports using these tags.

Tag Manager

Tags can be managed from the Tag Manager area of your CRM. Go to Contacts > Tag Manager from here you can:

- Add New Tags
- Edit Tags
- Merge Tags
- Delete Tags
- View a list of associated Contacts
- Remove Tag from associated Contact(s)
- View a list of associated Groups
How to Add a New Tag

- Go to Contacts > Tag Manager
- Click "Add New Tag"

Type the name of your tag and click Add

How to Edit Tags

- Go to Contacts > Tag Manager
- Find the tag you would like to edit and click Edit Tag
How to Merge Tags

- Go to Contacts > Tag Manager
- Click the checkbox next to the tags you would like to Merge then click Merge Tags
- You will have the option to
  - (1) Select one of the existing tag names
    - Select this option then choose an existing tag name and click Merge Tags
How to Delete Tags

- Go to **Contacts > Tag Manager**
- Click the checkbox next to the tags you would like to delete then click **Delete**.

An overlay will appear to confirm you would like to delete the tag(s). Click **Delete Tag(s)**. All associated CIDs will no longer be linked to these tags.
View Contacts

To view what contacts are associated with each tag:

- Go to Contacts > Tag Manager
- Find the name of the Tag and click View Contacts

From the View Contacts page you can see the
- Associated CID
- First & Last Name of the associated contact
- Business/Organization Name of the associated contact
- The date the tag was added to the associated contact
To remove a tag from an associated contact:

- Click the check box in the Action column of the associated contact then click **Remove Tag**.

An overlay will appear to confirm you would like to remove the tag(s). Click **Remove Tag(s)**. All associated CIDs will no longer be linked to this tag.

**View Groups**

To view what groups are associated with each tag:

- Go to **Contacts > Tag Manager**
- Find the name of the Tag and click **View Groups**
From the View Groups page you can see the

- Associated GPID
- Group Name
- The date the tag was added to the associated group

To remove a tag from an associated group:

- Click the check box in the Action column of the associated contact then click **Remove Tag**
Mass Tagging

You can add tags to an individual contact through their contact profile. If you would like to add a tag to multiple contacts at once, you will want to use our Mass Tag feature:

How to use the Mass Tag feature:

- Got to Contacts > Contact Reporting
- Use the filters to generate a report of the contacts you would like to tag
- For this example, if you want to tag everyone who has donated to your "Become a Member" campaign and tag them as Member
- You will need to add the following filter:
  - Filter: Donated in this campaign
    - Parameter: Is
    - Value: Become a Member
- Click Generate Report
Select an existing tag or create a new tag, in this case, you have already created a Member tag, so you will select it from the dropdown menu then click Mass Tag.

You will receive a confirmation email once the tagging is complete.

Note: Mass tagging will add this tag to ALL contacts generated in this report, there is currently not an option to exclude tagging a contact from the generated report.
• If you are looking for contacts who have contributed more than $500 to tag as Major Donors. You will need to add the following filter:
  ○ Filter: All Time Contribution Amount
  ○ Parameter: Is more than
  ○ Value: $500

• Click Generate Report

• Scroll down below the graph and click Mass Tag
- Select an existing tag or create a new tag, in this case, you need to create a new tag.

Click +Add New Tag and enter Major donor then click Add and Mass Tag.
You will receive a confirmation email once the tagging is complete.

Note: Mass tagging will add this tag to ALL contacts generated in this report, there is currently not an option to exclude tagging a contact from the generated report.

Add a Payment from a Contact Profile

When you manually add a payment from your Flipcause dashboard, you have the option to assign that payment to a Contact Record in your database. Alternatively, you can also manually add payments right from your Contact Profiles. Using this method gives you more visibility and helps ensure that manually entered payments are attributed to the correct contact record in your database.

To add a payment via an individual Contact Profile:

- From the dashboard, navigate to your supporter's Contact Profile. To do this, go to **Contact > search by Name, CID, Business/Organization, or email > Search > locate their contact profile in the search results > View Profile.**
Click the Add Payment button below the contact name and CID:

You'll be taken to the Add a Donation or Payment window. Here, you'll see a confirmation that this payment is going to the correct supporter:

- From here, you can follow the steps to Add a Payment. Note: the Contact Record Assignment and Personal Information sections will already be populated with your contact data.
Is there information you'd like to collect from or questions you'd like to ask of your supporters that isn't already part of Flipcause standard fields? Using Custom Fields, you can set up any kind of custom questions for your campaigns and database.

Once these are set up in the Custom Fields area, you can apply these to your Contacts and Groups within your CRM.

**Add a Custom Field to a Contact**

Go to the Contacts tab on your dashboard and find the Contact Profile of the person you're looking for. Scroll down until you see Custom Fields.

Click the Add button at the top of the Custom Fields area.

Find the custom field from the dropdown menu of custom fields.
Enter the custom field response you’d like saved for this person.

**Save** your changes.

Your custom field information will now be displayed on your Contact Profile.

**Find a Custom Field Response**

You can also view responses to Custom Field questions from within a supporter's Contact Profile.

Go to the *Contacts* tab on your dashboard and find the Contact Profile of the person you’re looking for. Scroll down until you see Custom Fields.
Click the VIEW MORE button at the bottom of the Custom Fields area.

You will see a list of all the Custom Field responses for that Contact. By default, the date range will filter results from the past 30 days. If needed, modify the Date Range and select a Custom Field Source, then click Filter Records to refine your list.

**Relationships**

You can add relationships to any Contact profile, and those relationships can be with people in your database or outside of it. This area will list their name, the relationship type, and any relationship notes you enter.
When you add a Relationship to someone who already exists in your Flipcause Contact Database, the Relationship will be added to both Contacts, and they will be linked together, with a reciprocal Relationship type displayed on each. For example, if you add an existing Contact as the "Manager" of a Contact, than the two Profiles will link to each other from the relationships section, one will be labeled as "Manager," and the other as "Direct Report." The same will be true for "Grandparent" and "Grandchild," "Parent" and "Child," "Employer" and "Employee," etc.

When you add a Relationship to someone who does not exist in your database, this person will not be created in your Flipcause Contact Database. The information will be displayed as a static reference in the Relationships section.
If you want to add a Relationship to someone who is not in the database, and that you want to add to the database, create a Contact Record for them first, then add the Relationship to an existing Contact Record.

Year-End Tax Receipts

The Flipcause Contact Database allows you to get one-click Annual Summaries for each Contact. The Annual Summary contains the year-end tax receipt of tax-deductible contribution totals and a full report or statement for that contact: their contact information, and an itemized breakdown of all of their contributions and activities with your organization for that year.

To view the Annual Summary for any contact, go to their Contact Profile and click Annual Summary. You'll be able to pick the year and get a link to your PDF.
If you plan to use these for your year-end tax receipts, don't forget to customize the thank-you message at the top. In your Contact Database, click on the CRM Customization tab and configure the greeting style and name preference you'd like, and your thank you message below. Because the tax receipt needs to fit on a single page, this message is limited to 3 lines and 300 characters, so keep it short and sweet.

You can also email this report to a contact by clicking “Annual Summary,” selecting the year, and typing in the email you’d like it sent to.
To send Annual Summaries and Tax-Receipts to a full list of contacts, do the following (detailed instructions here):

1. Pull a Contact Database Report of all desired contact records
2. Find the field on the Contact Report titled “[Year] Annual Summary PDF” (i.e. 2019 Annual Summary PDF”). This is a link to each Contact’s Annual Summary
3. Import your list into an email marketing program such as Mailchimp
4. Mail merge the field (here’s how to do this in Mailchimp)

**TIP:** Your annual summaries will automatically include all activity that took place on Flipcause. To ensure that your year-end tax receipts and statements provide the complete picture for your contact, you'll want to be sure to log the rest of their offline, cash, and check contributions to Flipcause and attribute them to this contact. You can do this using the Add a Payment section, or directly from the Contact Profile by clicking the "Add Payment" button (right next to Annual Summary).

**Group Records**

**What are Groups?**

In addition to individual Contacts, your database comes with a Group functionality. This is similar to "Households" in typical CRMs. To allow full flexibility, the Flipcause CRM allows you to have various types of Groups: Household, Business, Nonprofit, Foundation, School, Team, Club, Association, Religious Organization, Media Organization, Fraternity, Sorority, Other, or just a general Group.
How do Groups work?

- The Group Record will reflect a cumulative total of all the contributions and activities made by all members in that group.
- Every Group will also have a primary contact whose information will serve as the contact information (email address, phone number, etc.) for the entire group.
- Contacts can be part of multiple Groups. For example, if Christy Yip is one of your contacts, she can be part of the Yip Family Group (Household) along with other family members of hers that are in your database, as well as the Flipcause Group (Business) along with other colleagues of hers that are in your database.
- Any time a Contact Record is created, a Group Record is also created for it, and that Contact becomes the Primary Contact for its Group. The Group Record that is automatically created will be named after the Contact. For example, when a Contact is created for Alex Paranada, he is automatically part and primary of the Alex Paranada Group Record. However, once this is created, you can rename the group to anything you like, or add Alex to another Group if that is more appropriate. You can only delete the original, automatically-created Group, after Alex is added to another
Even though Groups are created automatically, for them to work correctly and reflect the most accurate information, you will want to keep them maintained manually, as in the above example. To get the full utility out of your CRM, you will want to ensure to put your related Contacts into the appropriate Groups.

Every individual Contact must be part of a Group, even if it's just their own individual group. In fact, most of your Contacts will be on their own in their respective Groups. We explain why this matters in the below section on how to use Groups vs. Contact Records.

**When would I use Groups instead of Contacts?**

Usually, when you'd like to send an email appeal, it makes sense to email every single person (Contact) in your database. This is when you would pull a report of all Contacts and their email addresses.

But often, when you want to send out an appeal with a physical mailer, you don't want to send 5 copies of the same letter to the same address. This is when it becomes useful to put your Contacts into Groups - whether it's by their households, work places, or other groups that might make contributions as a unit.

By using Groups and ensuring that the Primary Group Contact's mailing address is accurate, you can pull a report of your Groups for the purpose of creating a mail merge to send out physical letters or postcards. This way, each business, household, organization, or other location will receive only one mailing for the entire group.

This is exactly why every Contact must be part of a Group - you want to be sure all individuals get their own mailer, too.
How should I use Business Contacts with Groups?

Some organizations need the individual Contact Record to reflect a business/organization itself rather than any single person within that business. In these cases, be sure to indicate the Contact Type as "Business" and input the business/organization name instead of a first and last name.

Whenever you add a Contact Record, it will create a Group Record automatically. This works the same way with Business Type Contacts - they will get a Group Record also named after the Business name, and that Business Contact will be automatically the Primary Contact for the Business Group. You can certainly also add individual Contact Records to this same Group.

Whether your Business or Organization type Groups have a Business or Individual type Contact Record as their Primary Contact is up to you!

Soft Credits

What is a Soft Credit?

Soft Credits allow you to attribute credit for a contribution to an additional person without creating a duplicate record in your accounting. For example, if Tom Brady makes a $100 donation, then that $100 donation is naturally attributed to him. However, because you know that Tom Brady made this donation on behalf of his wife, Gisele Bündchen, you might want to give an "In Honor of" credit to her, without changing the donor's name for that transaction and without creating a duplicate financial transaction when only one donation was actually received. This is what a soft credit allows you to do.

(Anyone you're adding a Soft Credit for also needs to be a contact in your database before adding the credit.)
You can use Flipcause's soft crediting to credit parts of an activity to multiple people, or the entire amount of the activity.

Soft Credit Types:
- Solicited
- In Memory of
- In Honor of
- Peer Page
- Gift
- Recruited
- Other

How to add a Soft Credit
1. To add a Soft Credit on Flipcause, navigate to the contributor's Contact Profile, and scroll down to Activity History.
2. Find the Activity Record, and click the magnifying glass icon to open the details overlay.
3. Click the “Add Soft Credit” button to display the edit section, then select the Soft Credit type, amount, and notes. (This can be also be done from Reports > Transaction & Activity)
4. Search your Contact Records to find the Contact that you’d like to assign the soft credit to.
The Credit will then appear on both the Contact’s profiles, but the amount will only be counted once in your totals.

Adding a Soft Credit to a user will **not count** toward that user’s contribution totals at the top in their At a Glance Stats.

**Contact Reporting**

Contact reporting is used for your communications reporting: emails, direct mailers and mail merges.

Your Flipcause Contact Database allows you to manage your contacts, households, groups, etc. and keep them updated. For this reason, your Contact Reports is where the contact information will be the most accurate and up-to-date. In contrast, your activity and transactions reports will only pull the information exactly as it was entered at the time of the transaction, leaving you stuck with potentially outdated emails or addresses, or ones that contain typos.

We recommend pulling Contact reports for emailing, so that each person gets their own
For something like direct mailers, we recommend pulling Group reports, to avoid sending multiple duplicate flyers to the same house.

Payment Sources

When your supporters enter their credit card information on Flipcause, it's tokenized and encrypted, and stored in your Contact Profile's Payment Sources.

You can view these payment sources (but not ever view full credit card details), as well as add new payment sources manually. You can then use these to process additional purchases, donations, and payments. This area is located toward the bottom right-hand side of your Contact Profile page.

You can also remove a payment source by clicking the View icon to the right and then selecting **Remove This Card**.
Duplicate Check

The Duplicate Check feature allows you to search for potential Contact and Group Record duplicates. If a duplicate record is found, you'll be able to merge the matched records, or choose ignore the match and hide it from duplicate results.

**Contact Record Duplicate Check:** The Contact Record Duplicate Check searches all CIDs and compares for:

- Exact Match of “First Name” AND “Last Name” (Primary)
- Exact Match of “Email Address” (Primary)
- Exact Match of “Phone Number” (Primary)
- Exact Match of “Address” (Full Primary)
- Exact Match of “Last Name only” (Primary)

**Group Record Duplicate Check:** The Group Record Duplicate Check searches all GPIDs and compares for:

- Exact Match of “Address” (Primary)
If a duplicate is found, you can choose to:

- Merge the records into a single record
- Hide the duplicate result from the current search (These duplicate records will display again when you run another duplicate check)
- Permanently hide the duplicate result from appearing in all future duplicate check searches

**Merging Duplicate Records:** To merge duplicate records, click the Merge button. An overlay will display that allows you to select the “Winning” record. Whichever CID is selected as the "Winning" Record will be updated with the transactions, activity, communications, notes, and other information from the "Losing" record. After the merge complete, the "Losing" record will be deleted from the database. *(Read here for more information on what information can be transferred from the "Losing" record to the "Winning" record)*

**Note on Duplicate Match Process:**

Only 2 records at a time are presented as a match, even if a record might have multiple matches.

(i.e. Record A potentially matches Record B (reason - Email Match)
Record A potentially matches Record C (reason - Phone Number Match)
Record B potentially matches Record C (reason - Name Match)

The option to “Hide” a potential match, or “Merge” potential match will be presented. If Merged, all other presented Records in the Duplicate match will be hidden.
Record A potentially matches Record B (reason - Email Match)

- Action taken to Merge.
- Record A potentially matches Record C (reason - Phone Number Match)

This presentation is hidden because Record A is already matched with Record B. A new duplicate search needs to be run in order to see if the new merged record still matches Record C.

**Merge Manager**

Have duplicate records in your database? Not to worry! You can merge Contact Records as well as Group Records.

*Notes: Before you get started, we recommend that you review all duplicate records to ensure that the data you need is preserved in the process. We recommend running a contact report that includes all duplicate contact/group data and exporting to .csv before merging to have a backup of your data.*

Merging contacts or groups in the system involves selecting a "Winning" record. The winning contact or group record will remain in your database after the merge, and it should be the most up-to-date and complete record. You'll also select a "Losing" record, which will be deleted from the system. These records are deleted permanently and the data cannot be retrieved.

Key activity and transaction data from the losing record will be transferred over to the winning record during the merge, and you can choose what data in the personal details section you would like transferred over from the losing record to the winning record. Some data will be permanently deleted and will need to be manually added to the winning record. Continue reading to see what data will be transferred and what will be deleted.

**What happens to your data during a contact record merge?**

The “Winning” record will be updated with the “Losing” record's data (see the list below),
and the “Losing” record will be deleted from the system. All duplicate data from the merged records will be removed, and all “Primary” designations for names, emails, employers, etc. will remain the same for the “Winning” record.

The following fields will automatically be updated from all “Losing” records into the “Winning” record for Contact Merge:

- All Engagements (Activity/Transaction Records)
- All Custom Fields
- All Notes
- All Relationships
- All Peer Pages, All Subscriptions
- All Soft Credits
- All Documents
- All Important Dates
- All Payment Sources
- All Communication Notes

The following data in the Personal Details section can be transferred over from the "Losing" record to the "Winning" record as secondary data:

- First Name
- Middle Name
- Last Name
- Email
- Address
- Phone Number
  - Home
  - Mobile
  - Business
• Education

• Note: If any of the above fields are blank in the "Winning" record, the selected "Losing" record fields will transfer as **Primary** data in the "Winning" record.

The following fields can **only be transferred over if the fields in the "Winning" record is BLANK:**

• Profile Image
• Social Media Profiles & Website
• Tags
• Title
• Suffix
• Nickname
• Buisness/Organization Name
• Pronoun
• Birthdate
• Deceased Date
• Marital Status

The following fields data will be **permanently deleted** from the “Losing” records during the merge:

• Contact ID (CID)
• Contact Type
• Groups
Once you've reviewed your duplicate records and are ready to complete a contact merge:

- Go to Contacts > Merge Manager.
- Select Record Type: Contact Records

Then, search for the two records you'd like to merge, and click "Merge Selected Records."
Help Center allows you to select the “Winning” record. From the dropdown list, select the record that you would like to keep in your database.

The overlay will expand with all of the data fields you can transfer from the "Losing" record to the "Winning" Record. Select the fields you would like to transfer from the "Losing" record to the "Winning" record. Any fields you do not select will be permanently deleted from the database (see full list above of what data fields are transferrable and what will be permanently deleted).

**NOTE:** merging records is permanent and cannot be undone.

- Click Merge Records.
- You'll receive a confirmation that the merge is complete:

```
The Winning Record has been successfully updated.
```

At this point, we recommend reviewing the updated record in your system to make sure it contains all the details you need. If anything is missing, you can manually add the data to the record using the backup you created at the beginning of the process.
What happens to your data during a group record merge?

During a group record merge, the “Winning” record will be updated with the “Losing” records data (see the list below), and the “Losing” records will be deleted from the system. All duplicate data from the merged records will be removed, and all “Primary” designations for names, emails, employers, etc. will remain the same for the “Winning” record.

When merging a Group record, you also have the opportunity to update or change the existing Group Name and Group Description for the “Winning” record.

The following fields from the “Losing” records will be added to the “Winning” Group record:

- All Associated Activity/Transaction Records
- All Custom Fields
- All Members
- All Peer Pages, All Subscriptions
- All Communication Records
- All Notes
- All Documents

The following field data from the "Losing" records will be deleted permanently:

- Group Name
- Group Type
- Primary Group Contact
- Email
- Phone Number
- Address
Completing a Group Merge

Once you've reviewed your duplicate records and are ready to complete a merge:

- Go to *Contacts > Merge Manager*.
- First, select whether you want to merge Contact Records or Group Records.
- Then, search for the two records you'd like to merge, and click "Merge Selected Records."
An overlay will display that allows you to select the “Winning” record. From the dropdown list, select the record that you would like to keep in your database.

You will then be able to select which data fields from the

**NOTE: After the merge is complete...**

- Whichever GPID is selected as the "Winning" Record will be updated with the Activity History, Campaign Messages, Documents, Custom Fields, Engagements, Notes, Payment Sources, and Soft Credit section data from the losing contact profile.
- The Group Details, and Tags section data from the losing contact profile will get deleted permanently and the "Losing" record will be deleted from the database.
- Please note that merging records is permanent and cannot be undone.

- Click **Merge Records**.

- You'll receive a confirmation that the merge is complete:
At this point, we recommend reviewing the updated record in your system to make sure it contains all the details you need. If anything is missing, you can manually add the data to the record using the backup you created at the beginning of the process.

Data Import

Begin the Data Import Process

We're excited to help you import your data to Flipcause!

To get the data import process started, please schedule a call with your Account Services Manager: https://calendly.com/fcservices/data-import.

They will go over next steps and coach you on how to use tags, custom fields, and other things to look out for to ensure the cleanest data import possible.

Important things to note:

We will import two separate sets of data into your Flipcause Database:

- Transaction Data
- Contact Data

As such, we will need a separate CSV (or XLS) file submitted for each. But if you only have transaction data, that's ok. The system will automatically create contacts out of transaction data, along with the transactions.

The need for a differentiation between the two is that they are not necessarily related. One contact might have several transactions, while another person might have no transactions.
These two layers of information combine together to give you complete information in your Flipcause Database and to use it like a CRM (rather than just for bank data, or just for email addresses).

1. **Unique IDs**

If a single Molly Jones has 4 transactions, we want to be sure we create 1 Contact for Molly Jones with 4 Transactions attributed to her, instead of 4 Molly Jones contacts each with 1 Transaction. Unless of course, you do have 4 separate Molly Joneses in your database, in which case we'll want the latter.

To make sure the data is imported correctly in such cases, we will use a unique ID:

- If you are exporting your data from another database, please include the CID (Contact ID) or other unique ID your current system uses. This will allow us to match the import by these existing unique IDs and get the data uploaded correctly.
- If you don't have unique IDs already, we'll match by email. This means that all data with the same email address will be treated as related to the same contact.
- If any data does not have an associated email in it, we will assign our own ID and upload those individually. This means if you have multiple entries for "Molly Jones" that don't have an email, they will all be uploaded as separate people into the database. This also means that if you have multiple entries for "Molly Jones" and some have an email and some don't, the ones with the same email will get matched as the same person, but the ones that don't have an email will be created as new people.

*It's not possible to undo or delete data imported due to errors in the submission file. To avoid duplicate errors, you'll want to review your data and clean it before submission.*

(But if you do end up with duplicates in your database, don't worry. You can run a duplicate check and merge them pretty easily.)
We will map your existing data fields to Flipcause data fields. Existing fields are composed of Flipcause standard Transaction Fields, Flipcause standard Contact Fields, and the custom fields that are in your Flipcause account. If your data file contains fields that don't match Flipcause standard fields, we will check to see if they match any custom fields in your account. If they don't match any custom fields in your account, we will create those custom fields in your account first, to allow the full data set to be imported.

(To see which custom fields are in your account, sign into your Flipcause Dashboard and click on Custom Fields on the left-hand navigation menu.)

3. Remove any data you do not want imported before submitting your CSV.

We will import all data submitted. If you want anything excluded, please be sure to clean the file you submit to us and remove any unwanted information.

Contact Fields

CONTACT FIELDS

Personal Details

- Contact ID (CID)
- Contact Type (Individual/Business)
- Full Name
- Title
- First Name
Help Center

- Last Name
- Suffix
- Formal Name
- Nickname
- Business/Organization Name
- Email
- Marital Status
- Birthdate
- Age (Years)
- Deceased (Y/N)
- Deceased Date
- Pronoun
- Address
- Address 2
- City
- State/Province
- Postal Code
- Country
- Primary Home Number Country Code
- Primary Home Number
- Primary Home Number Ext
- Primary Work Number Country Code
- Primary Work Number
- Primary Work Number Ext
- Primary Mobile Country Code
- Primary Mobile Number
**Employer Details**

- Employer
- Position/Title
- Employer Address
- Employer City
- Employer State/Province
- Employer Postal Code
- Employer Country
- Employer phone country code
- Employer Phone number
- Employer phone extension
- Length of time at current employer (Months)
- Annual Income

**Websites and Social Media**

- Facebook Profile
- Twitter Profile
- LinkedIn Profile
- Google Plus Profile
- Instagram Profile
- Websites

**Education**

- High School Attended
- High School Completed Date
Documents

When supporters receive an event registration confirmation via email or sign a waiver, an encrypted .pdf version is automatically stored in the Documents section at the bottom of their Contact Profile.

Click the View icon to the right of a Document in the list to access a link to the document, change its description, or remove it.
You can also manually upload jpg, jpeg, png & pdf documents to a Contact Profile by clicking the Add button at the top right.

In the Add Document window, enter a Name of File that will display in the Documents section (this does not have to be the same as your file name) and optional description. Use the Choose File button to select a file from your computer and click Save when done.
Within a **Contact Profile** you will find a section labeled **Communication Notes**. Here you can log incoming and outgoing communication with your constituents including email, phone calls and in person conversations. *(Note: Currently all communication will need to be manually added into this area of the CRM).*

To add a new communication log, find the **Communication Notes** area and click **Add**.

![Communication Notes (2)](image)

Fill in the information regarding your communication. The options for "Communication Type" are: In Person, Email, Phone Call, SMS Text, Fax, Mail. Be sure to click **Save** when you are done.
Transaction Fields

TRANSACTION FIELDS

Transaction Details

- Transaction ID
- Campaign Title
- Campaign ID
- Transaction Date
- Transaction Time (EST)
- Day of week
- Transaction Type

Personal Details

- Individual or Business
- Title
- First Name
- Middle Name
Help Center

- Suffix
- Email
- Profile Image
- Business/Organization Name
- Address
- Address 2
- City
- State/Province
- Postal Code
- Country
- Phone Number Type
- Phone Country Code
- Phone
- Phone Extension
- Marital Status
- Pronoun
- Birthdate
- Wants to Remain Anonymous?

Employer Information

- Employer
- Position/Title
- Employer Address
- Employer City
- Employer State/Province
- Employer Postal Code
Help Center

- Employer Phone Country Code
- Employer Phone Number
- Employer Phone Extension
- Annual Income
- Length of time at current employer

Websites and Social Media

- Facebook Profile
- Twitter Profile
- LinkedIn Profile
- Google Plus Profile
- Instagram Profile
- Websites

Education

- High School Attended
- High School Completed Date
- Undergraduate School Attended
- Undergraduate School Completion Date
- Graduate School Attended
- Graduate School Completion Date
- Post Graduate School Attended
- Post Graduate School Completion Date

Charge Details

- Transaction Source
Transaction Amount Subtotal
Transaction Discount Amount Total
Transaction Shipping Cost Total
Total Transaction Amount
Transaction Sales Tax Amount Total
Transaction Fair Market Value
Transaction Tax Deductible Amount
Transaction Tax Deductible Amount Adjustment
Fee Paid by Supporter?
Processing Fee Paid by Supporter (Directly to Flipcause)
Processing fee Paid by Organization
Total Charged Amount
Net Received (Flipcause Gateway)
Net received (Offline)
Fee Coverage Option Setting
Guarantee-Qualified Transaction
Payment Method
Trace Number
Settlement Date
Transaction Receipt URL
Transaction Completion Status

**Donation/Payment Details**

- Donation/Payment Order
- Donation/Payment Order Discount Code
- Donation/Payment Order Discount Amount
- Donation/Payment Order Shipping Cost
Donation/Payment Order Sales Tax Amount
Donation/Payment Order Amount Paid
Donation/Payment Order Fair Market Value
Donation/Payment Order Tax Deductible Amount
Donation/Payment Order Subtotal
Donation/Payment Order Discount Code Subtotal
Donation/Payment Order Discount Amount Subtotal
Donation/Payment Order Shipping Cost Subtotal
Donation/Payment Order Sales Tax Amount Subtotal
Donation/Payment Order Fair Market Value Subtotal
Donation/Payment Order Tax Deductible Amount Subtotal
Pledge Amount
Associated Donation/Payment Order ID(s)
Payment Level Title
Payment Level Description
Frequency
Donation Status
Donation Completion Date
Donation Cancellation Date

**Tribute Details**

- Tribute Type
- Tribute Name
- Tribute Email
- Tribute Message
- Tribute E-Card PDF

**Online Shop Sale Details**
Help Center

- Item Order Discount Code
- Item Order Discount Amount
- Item Order Shipping Cost
- Item Order Amount Paid
- Item Order Sales Tax Amount
- Item Order Fair Market Value
- Item Order Tax Deductible Amount
- Item Order Subtotal
- Item Order Discount Amount Subtotal
- Item Order Shipping Subtotal
- Item Order Total
- Item Order Sales Tax Amount Subtotal
- Item Order Fair Market Value Subtotal
- Item Order Tax Deductible Amount Subtotal
- Total # Items in Order
- Associated Item Order ID(s)
- Item Order Status
- Item Order Completion Date
- Item Order Cancellation Date
- # Items Complete
- # Items Cancelled

Registration Details

- Registration Order
- Registration Order Discount Code
- Registration Order Discount Amount
Help Center

- Registration Order Sales Tax Amount
- Registration Order Amount Paid
- Registration Order Fair Market Value
- Registration Order Tax Deductible Amount
- Total # Participants
- Registration PDF Confirmation URL(s)
- Associated Registration Order ID(s)
- Registration Order Subtotal
- Registration Order Discount Amount Subtotal
- Registration Order Shipping Cost Subtotal
- Registration Order Sales Tax Amount Subtotal
- Registration Order Total
- Registration Order Fair Market Value Subtotal
- Registration Order Tax Deductible Amount Subtotal
- Registrations Status
- # Registrations Completed
- # Registrations Cancelled
- Registration Completion Date
- Registration Cancellation Date

Sponsorship Details

- Sponsorship Order
- Sponsorship Order Discount Code
- Sponsorship Order Discount Amount
- Sponsorship Order Shipping Cost
- Sponsorship Order Sales Tax Amount
- Sponsorship Order Amount Paid
- Sponsorship Order Fair Market Value
- Sponsorship Order Tax Deductible Amount
- Sponsorship Order Subtotal
- Sponsorship Order Discount Amount Subtotal
- Sponsorship Order Shipping Cost Subtotal
- Sponsorship Order Sales Tax Amount Subtotal
- Sponsorship Order Total
- Sponsorship Order Fair Market Value Subtotal
- Sponsorship Order Tax Deductible Amount Subtotal
- Associated Sponsorship Order ID(s)
- Total # Sponsorships in Order
- Sponsorship Order Status
- Sponsorship Order Completion Date
- Sponsorship Order Cancellation Date
- # Sponsorships Complete
- # Sponsorships Cancelled

**Volunteer Details**

- Volunteer Order
- Total # Volunteers
- Associated Volunteer Id(s)
- Volunteer Status
- Volunteer Completion Date
- Volunteer Cancellation Date
- # Positions Complete
- # Positions Cancelled
Refund Details
- Refund Amount
- Refund Issued
- Refund Issued Date
- Associated Refund ID

Waiver Details
- Waiver PDF URL
- Waiver Birth Date

Miscellaneous Details
- IP Address
- User Agent
- Message
- Additional Information
- Notes

Credit Card Details
- Card Brand
- Card Last 4 digits
- Expiration Date
- Card State
- Card Country Code
- US Card?

Assign & Reassign 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.**
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:
- 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:
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.

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

From the View Donation Details window, click the **Reassign CID** button at the top right.
Select the desired record and click **Reassign to this CID**.

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

**Deleting Contact Records**

You can permanently delete contacts and their associated personal information from the Flipcause database.

When you delete a contact record, all personal details, custom fields, notes, soft credits, important dates, relationships, and all data that has been added directly to the Contact record will be deleted permanently. Once deleted, this information cannot be recovered.

Deleting a Contact will also remove them from their related **Groups**.

Note: If the deleted contact is the Primary and ONLY Contact for any group, that group and all associated Group details will also be deleted. If the deleted contact is the Primary member of a Group with multiple members, then the member of the group with the oldest Added Date will become the Primary Contact.

**To delete a contact record:**

- Navigate to **Contacts > Contact Records**.

- Use the Search or Sort options to locate the Contact Record you want to delete from the database. Then scroll down to find it in the list.

- Click the red Delete Record button in the right-hand column of that record.

- You’ll be prompted to confirm that you want to delete the record. **Note: this action cannot be undone.**
Please be aware that deleting the contact record does NOT delete associated records that contain transactional data, including Transactions (and any manually added custom fields), Activities, Subscriptions, Peer Pages, and Payment Sources. This is because your Flipcause account is a Merchant Account (like your bank or Paypal account) where you cannot manually delete or alter your transaction history.

- As a result, before you can delete the contact record, you will need to select either:
  - Unassign all of these associated records. This will create floating records that you can reassign to a CID later.
  - Reassign all of these associated records to another Contact ID. After selecting this option, you can enter the Name or CID of the contact you would like to reassign the associated records to and select it from the dropdown list.

- Click the checkbox to agree to the terms.

- Select Delete Record.

- You will receive a confirmation that the record has been deleted:

![Confirmation of Record Deletion](image-url)
Deleting Group Records

You can also delete Group Records from the database. Note: deleting a Group record is permanent and cannot be undone. Groups are primarily used as a way to group related individuals who share an address, and a common reason for deleting a group record is that individuals at a particular address no longer want to receive paper mail.

Deleting a Group Record dissociates all of the contacts within it. However, the individual Contact Records within the group will remain in your database. The difference will be that the deleted Group Record is removed from their profiles. When you delete a Group record, all of the personal Group details (including notes, custom fields, documents, etc.) will also be permanently deleted.

To delete a group record:

- Navigate to Contacts > Group Records.
- Use the Search or Sort options to locate the Group Record you want to delete from the database. Then scroll down to find it in the list.
- Click the red Delete Record button in the right-hand column of that record.
- A popup window will appear asking you to confirm that you want to delete the record:
Click the checkbox to agree to the terms.

Select Delete Group Record.

You will receive a confirmation that the record has been deleted:

www.flipcause.com says
The Group Record has been permanently deleted.

OK

The Flipcause Contact Database Match Algorithm, Explained

All new Flipcause Gateway transactions and transaction data imports from other systems will trigger the Flipcause Match algorithm. This algorithm determines whether the transaction should create a new Contact Record or assign the transaction to an existing Contact Record.

Once a transaction enters the system, this algorithm runs to attempt to match the transaction data with existing Contact Record Data:
Match Type: Depending on the Record Type, either the “Standard Match Sequence” or the “Alternate Associated Match Sequence” will be used.

Standard Match Sequence: Based on email address

This sequence is used for the following record types:

- Transactions through Campaign Landing Pages and Widgets
- Registrations
- Volunteers
- Peer Pages
- Soft Credits
- Engagement Records
- Transactions through the Manual Gateway (with no CID previously assigned)
  - **Email Match** - All Contact IDs (CIDs) with an EXACT match for “Email” field are located. If there is ONLY 1 record that meets this criteria, then the new transaction (and all associated personal data) is assigned to the matching Contact. If more than 1 records match, then the “Multiple Match” sequence is followed.
  - **No Matches** - If the Email Match results in zero CID matches, then a NEW Contact Record is created using the Personal Details from the Transaction.
  - **Multiple Matches** - If more than 1 records contain the same email address, all matching records undergo a “Full Name” exact match comparison. If there is not an exact match for “Full Name”, a new Contact Record is created. If there is a match for “Full Name”, the transaction data is assigned to the most recently added record.

*A note on Manual Payments:*
The CID standard match sequence is run when the “Finish” button is clicked on the Manual Payments main page. A CID will be assigned based on the standard match sequence (Email match). If there is no email added, a CID will not be assigned.

After this main page, there is a confirmation page where you have the option to add or edit the name and email fields and send a receipt. If you add or edit information on this page, the original transaction will be edited, so the match sequence must run again when the “Save” button is clicked. If there was already a CID assigned to the transaction from the main page, nothing will happen (since CID is already associated with a transaction).

**Alternative Associated Match Sequence: Based on existing associated CID**

This match sequence is used for the following record types:

- Donation Records
- Item Order Records
- Sponsorship Records
- Mailing List Records
- Subscription Records
- Refund Records
- Soft Credit Records (when added from Activity Reports > Details Overlays)
- Transactions through the Recurring Gateway (based on existing subscriber’s CID assignments)

During CID assignment, the above record types that use the “Alternative Associated Match”. This means that they will be assigned the same CID as their Associated Record. For example: If D1000123 has the Associated Transaction ID T1000123, then D1000123 will match the Assigned CID of T1000123. However, this should not be retroactive, only during initial CID assignment. For example if the CID assignment of T1000123 is edited by the user at a later time, it will not change the CID assignment for D1000123.
A Note on Recurring Payments

If the subscriber changes their personal info from their Personal Edit link, or if you change their details from Activity Management > Edit Subscriber, your subscriber data and their associated CID data and Contact Profile is automatically updated with the new data.

Send Out Year-End Tax Receipts

Looking for a quick way to send out everyone’s year-end tax letters?

First, be sure to customize the thank you message at the top of the receipt. Let your supporters know how impactful their contributions have been!

You can use your Contact Report to export a CSV of everyone's Annual Summaries, which include their year-end tax receipts as the first page, and use this report to email everyone their reports. Here's how:

Step 1: Get the report from Flipcause

1. Go to Reports > Contact Database Reporting (Contacts > Contact Reporting will also take you there)
2. Since we'll be emailing these out, keep Choose Report Type = Contact Records (Group Records is best for direct mailers).
3. Optional: Restrict based on other filters, such as Business or Individual records, tags, or contribution amounts.
4. If you're pulling reports for 2019, set Years Contributed to contains 2019 to include all 2019 donors. Here is an example of including all 2019 Individuals AND Business
5. Click **Generate Report**.

6. Scroll down and click **View Full Report** > **Send me report via email** > enter your email > click **Get Report**.

7. Check your email. Your report should arrive in a few minutes (it may take longer if it's a large report). Click the link in your email to download the report.
Step 2: Clean the data

1. You can open the report in Microsoft Excel if you have that on your computer, or use Google Sheets.

2. Your report will contain all available fields on your contacts, but for purpose of sending this e-blast, only 3 are required: Email, First Name (or which ever variation of their name you prefer to address your donors by), and 2019 Annual Summary PDF (assuming this is for 2019, of course). Delete the columns of fields you don’t need and save your file as a CSV - it is now ready for import into your email program!

<table>
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<th>B</th>
<th>C</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>First Name</td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td>Josephine</td>
<td>@yahoo.com</td>
</tr>
<tr>
<td>3</td>
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<td>6</td>
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<td>8</td>
<td>Tony</td>
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<td>9</td>
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<td>@gmail.com</td>
</tr>
<tr>
<td>10</td>
<td>James</td>
<td>@gmail.com</td>
</tr>
</tbody>
</table>

Step 3: Prepare & send email merge

1. The next steps vary depending on what email program you use. For most, like Mailchimp, you'll want to import your list. During importing, make sure you get all the fields and pick titles for them in your email program so it is able to merge them for you.

2. If you don't have an email program, you can draft this email in your Google email, and use Yet Another Mail Merge (which will pull the merge fields directly from your Google Sheets!)

3. Write an email draft to thank your donors.
Insert the merge tags that will pull from your spreadsheet fields. Depending on what email program you use, the merge tags will be different. Here's more info on how to do this with Mailchimp. Don't forget to include a merge tag for the column/field that contains the link to the PDF report!

In it's simplest format, your email draft should look something like this:

Hi [First Name],
Thank you for your contributions this year. Enclosed is your year-end tax receipt which you can download here: [2018 Annual Summary PDF]

5. Now that you have your email template with merge tags, your list of names and annual reports, you are ready to schedule your email send to everyone!

TIP: Your annual summaries will automatically include all activity that took place on Flipcause. To ensure that your year-end tax receipts and statements provide the complete picture for your contact, you'll want to be sure to log the rest of their offline, cash, and check contributions to Flipcause and attribute them to this contact. You can do this using the Add a Payment section, or directly from the Contact Profile by clicking the "Add Payment" button (right next to Annual Summary).

You can view and email a year-end tax receipt individually from the Contact Profile.

Admin Access to Contact Database

To give or remove Contact Database (CRM) access to an Admin click Manage Admins on the side navigation.

- Find the admin in the Manage Admins area and click Edit Privileges
- Scroll down to Contact Database Privileges and Select to give access and Deselect to remove access