How to Log a Check Payment
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To log a Check Payment into Flipcause you will need to take the following steps:

1. Enter the Check Payment Information
2. Assign the payment to a contact and campaign
3. Add any additional Information
4. Confirm information
5. Optional: Send Email Receipt

See below for step-by-step directions for each of the steps above.

Enter the Check Payment Information

- Go to “Add a Payment” on the sidebar navigation, then click the second button: “Add a payment record from another payment method (cash, check, 3rd party service)"

- Enter Payment Information
  - Enter the amount that you received
  - Toggle "Did you pay a processing fee?" to No
  - Payment Method: Check
  - Add check number in Optional: Trace Number box
  - Enter payment date (past and future dates are accepted)
Note: There is NO processing fee to record Offline Payments. When logging offline payments to Flipcause, they are added into your activity and transaction reporting for performance tracking, but will not show up in your Merchant Account area since these payments were not processed with your Flipcause merchant account / gateway.

Assign the Check Payment to a Contact and Campaign

In order to ensure your cash payment is associated to a campaign and contact you will want to add more information.

Contact Assignment:

- Click +Add More Information
- If your supporter already exists in your database, you can lookup their contact and their personal information will pre-populate in the Personal Information section from their contact record
- Click Add Contact Assignment to lookup contacts in your database:
A popup window will open where you can search by Name or Business/Organization. Enter this information and hit Search, then locate the desired Contact Profile in the results and click Select.

Note: These steps will associate a payment with an existing Contact ID. Alternatively, you can also manually add payments from within contact profiles.

If your supporter is not already in your database, you can put their information into the Personal Information section and a new contact record will be created after you finish. (Note: a contact record will be created based on the email address entered in this section)

Campaign Association & Peer-to-Peer Referrals

In the Campaign Information section, use the dropdown menus to select a campaign association. For Peer-to-Peer campaigns, you can also use the Referred by dropdown list to associate the contribution with an individual fundraiser.
Add Other Information:

You can attach other relevant information to this check payment such as custom fields, payment notes, tax deductible status, and a custom receipt message. See below for how to add this other information:

- **Tribute Donations**
  - To add a tribute donation, click **Add a Tribute Donation** in the Personal Information section.
  - A pop-up overlay will appear where you can add the tribute information and send an e-card.

- **Custom Fields**
  - Click **Add Custom Field** and select the custom field you would like to add. You can add multiple custom fields in this section.
• **Payment Notes**
  - Add a Payment Title & Description to match giving levels set up in a campaign
  - You can also add any notes related to the payment in the Payment Description

![Payment Notes]

• **Tax Percentages & Discounts (by Percentage or Dollar Amount)**
  - Set the tax deductible percentage
  - Apply any discounts if applicable

![Taxes & Discounts]

• **Receipt Info: Custom Receipt Message & Tax Deductible Disclaimer**
  - Set a custom receipt message (Note: receipt settings from the associated campaign will NOT transfer over)
  - Set whether to show or hide tax-deductible amount and disclaimer on the receipt
**Advanced Receipt Settings:** If you'd like to change default information to be displayed on your receipts, click "Show Advanced Receipt Settings". Here, you can change the logo, organization name, address, and phone number that will be displayed on your receipt. You can also change the Payment descriptor in this section (to read "Donation", "Sponsorship", etc).
Review and Checkout

Once you have added all of the relevant information, you can review your information and checkout.

- Click **Proceed to Checkout** then **Finish**

Confirm Information and Send Receipt

The confirmation screen will display the name, email, and tax deductible status of your transaction. If you have not added Additional Information, these fields will display as "Anonymous" and "Not tax deductible". Make any necessary changes to these fields, and then decide whether or not you'd like to send a receipt to your supporter.

To send a receipt:

- Click the "Would you like to email a receipt to the supporter" toggle to **Yes**
- Click **Confirm and Finish**
- An email receipt will be sent to the email listed on the final page
Note on Reporting:

Payments are recorded in your reports with the Transaction Source listed as "Manual Payment - Offline Payment". All payments added through the Add a Payment portal will appear in reports as Transaction Type: Donation.