How to add offline contributions

Campaign Pricing & Payments · https://connectionpoint.com/help/how-to-add-offline-contributions/

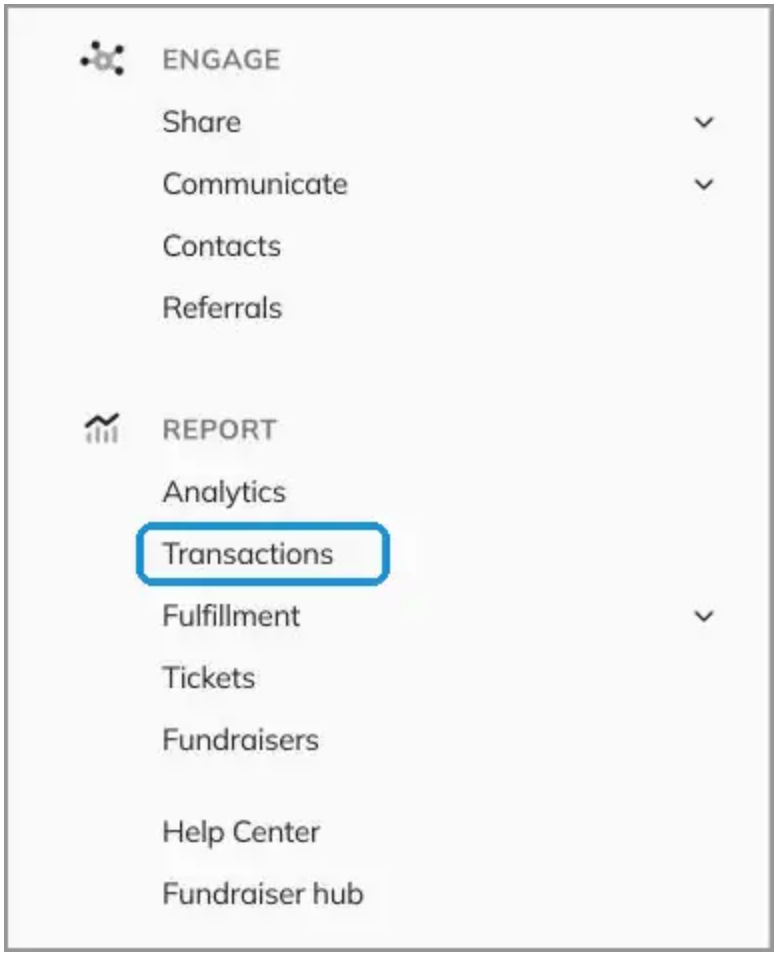
Attribute cash or other outside contributions - from events and conventions, sponsor contributions, a cheque ('check' for our American friends) from your grandma - to your campaign through offline contributions!

Important notes about offline contributions:

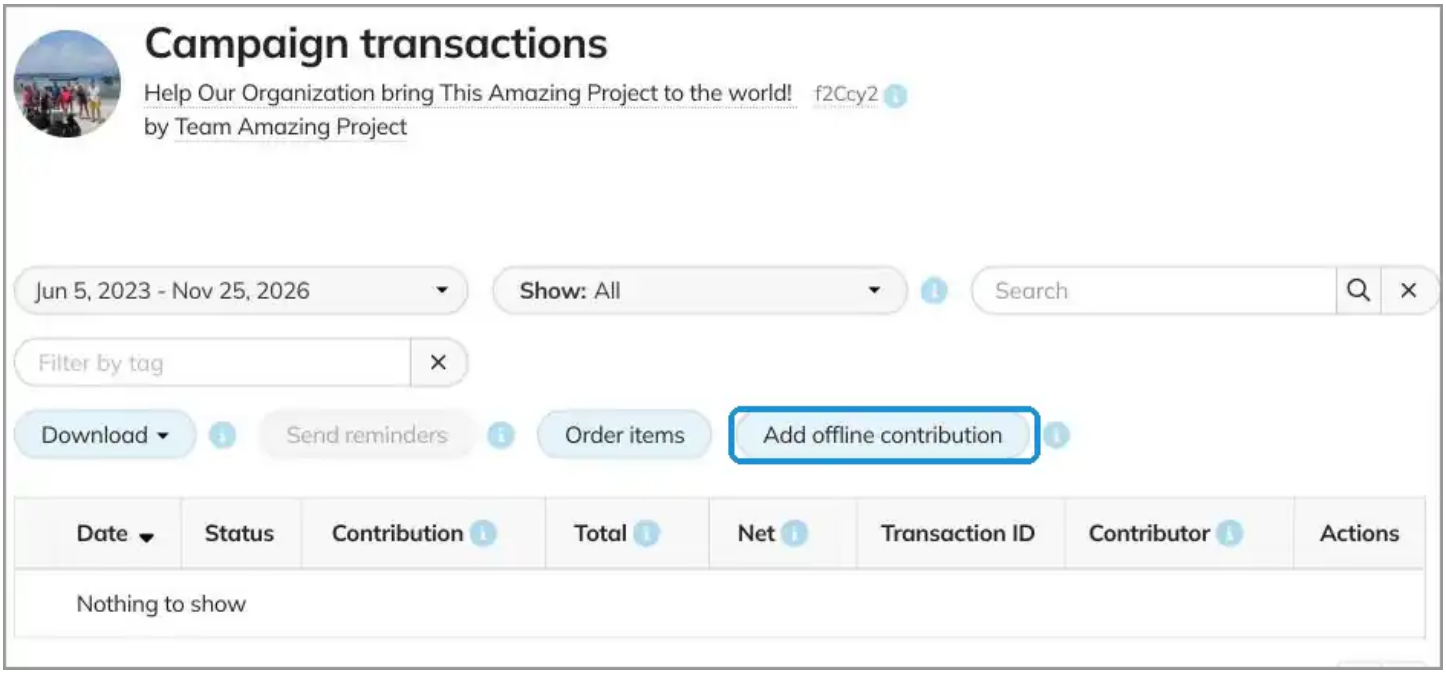
- **You cannot add offline contributions to a Simple Donation Form Layout.**
- They cannot be added to campaigns that are still in draft mode. Campaigns must be launched (or paused) to add.
- Currently, only 1 reward can be claimed via this method. But you must first create the offline contribution, and then you can add the 1 reward.
- **They are FREE to add!**
- Since they are not actual transactions, you can delete them if necessary.

Adding

STEP 1 - Click 'Transactions' under Report in your campaign menu.



STEP 2 - Click 'Add offline contribution'.

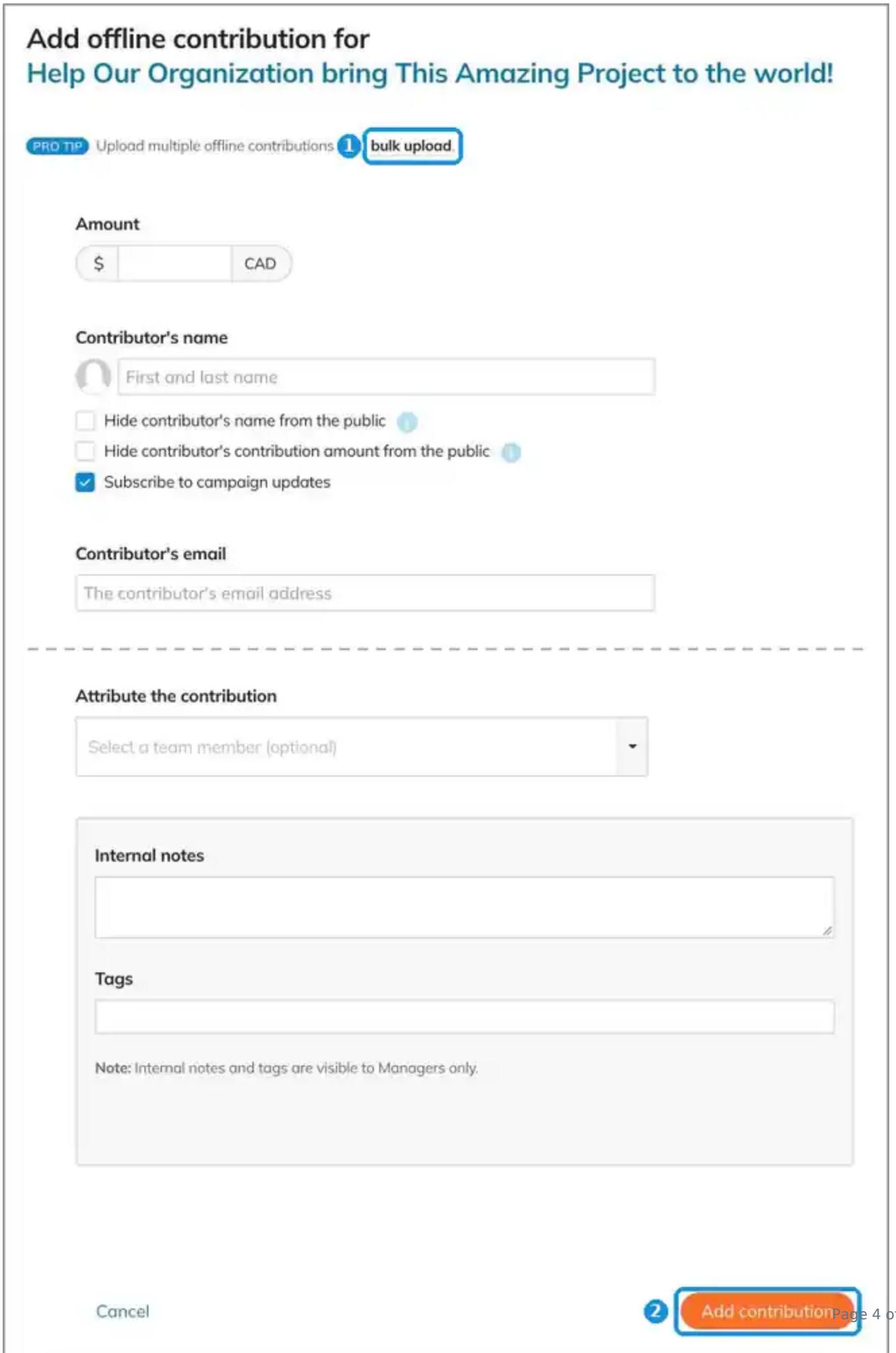


This must be the campaign transactions menu. You cannot add offline contributions to the Organization profile's transaction menu.

STEP 3 - Fill out the form. Only the amount is needed; the other details are for your records. Then click 'Add contribution'.

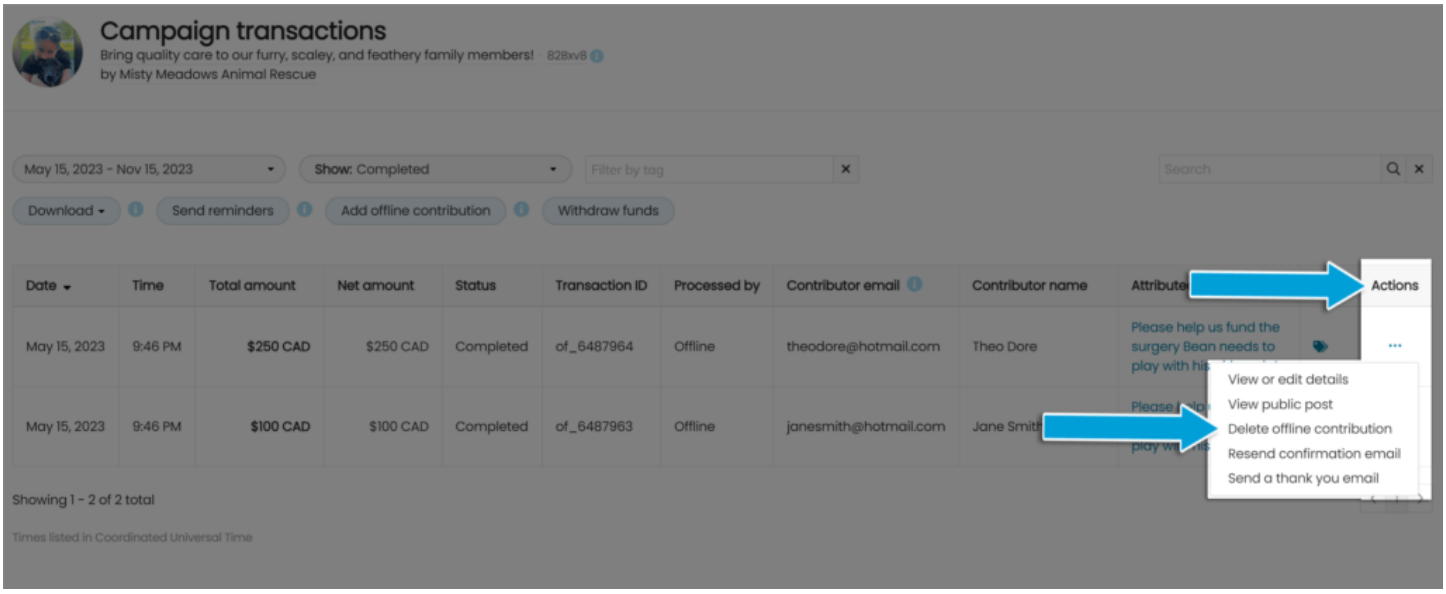
You can also choose the date and time of the contribution, credit it to a team member, and add internal notes and tags (visible to Managers only).

To add several at once, click the 'bulk upload' link at the top of the form (CSV only).

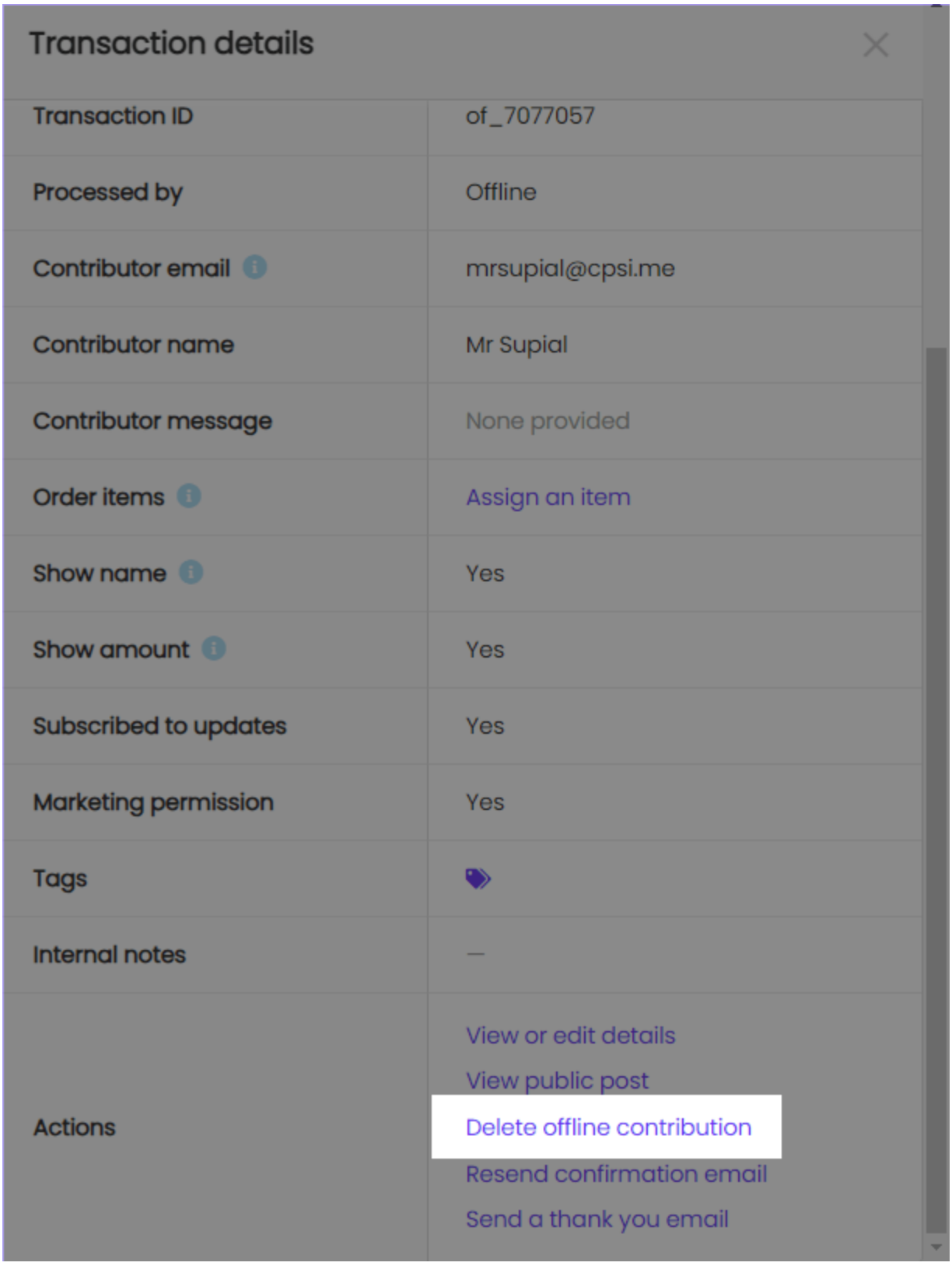

Add offline contribution for
Help Our Organization bring This Amazing Project to the world!
PRO TIP Upload multiple offline contributions 1 bulk upload.
Amount
$
CAD
Contributor's name
First and last name
Hide contributor's name from the public
Hide contributor's contribution amount from the public
Subscribe to campaign updates
Contributor's email
The contributor's email address
Attribute the contribution
Select a team member (optional)
Internal notes
Tags
Note: Internal notes and tags are visible to Managers only.
Cancel
2
Add contribution

Deleting

Click the three dots in line with the 'Actions' menu of the transaction in question, then 'Delete offline contribution."



You can also click anywhere on the table in the transaction line to open the full menu and delete the transaction there.


Transaction details
Transaction ID
of_7077057
Processed by
Offline
Contributor email
mrsupial@cpsi.me
Contributor name
Mr Supial
Contributor message
None provided
Order items
Assign an item
Show name
Yes
Show amount
Yes
Subscribed to updates
Yes
Marketing permission
Yes
Tags
Internal notes
—
Actions
View or edit details
View public post
Delete offline contribution
Resend confirmation email
Send a thank you email


fundrazr


petfundr


crowdfundr


cocopay