

OFFLINE DONATIONS – Manage Users Module (Instructions for Clients)

This guide covers


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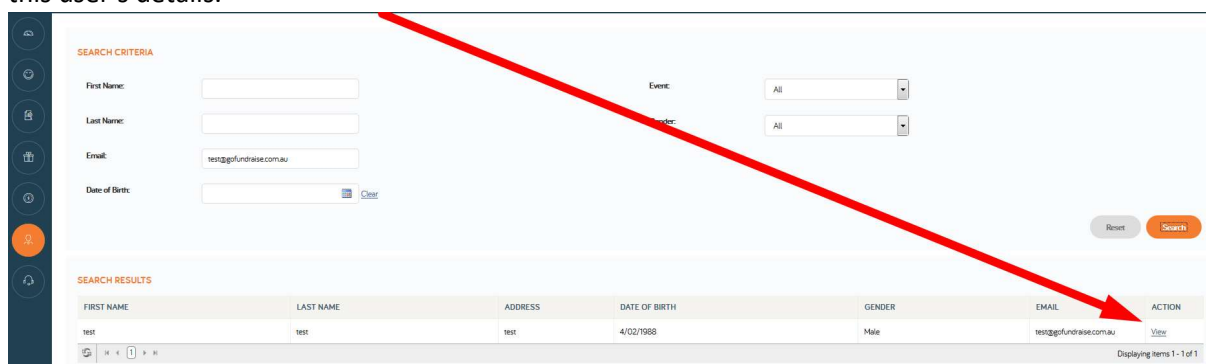
What You Need

- Manage Users Module
- Access to Beneficiary
- Access to Event

How to Add a Donation to a...

A Fundraising Page

1. Log into your **GoFundraise Admin Account**
2. From the main menu on the left side bar, click the **Manage Users** icon ()
3. Use the **Search Criteria** to search for the **name/email/event** of the Fundraiser that the offline donation is to be in added to, then click view on the correct result, to view this user's details.



The screenshot shows the 'Manage Users' section of the GoFundraise Admin interface. On the left is a dark sidebar with a 'Manage Users' icon. The main area has a 'SEARCH CRITERIA' section with input fields for First Name, Last Name, Email (pre-filled with 'test@gofundraise.com.au'), and Date of Birth. There are also dropdown menus for 'Event' and 'Status', both set to 'All'. 'Reset' and 'Search' buttons are at the bottom right of the search criteria. Below is a 'SEARCH RESULTS' table with one row of data. A red arrow points from the 'View' link in the 'ACTION' column of the search results to the 'Manage Users' icon in the sidebar.

| FIRST NAME | LAST NAME | ADDRESS | DATE OF BIRTH | GENDER | EMAIL | ACTION |
|------------|-----------|---------|---------------|--------|-------------------------|----------------------|
| test | test | test | 4/02/1988 | Male | test@gofundraise.com.au | View |

Displaying items 1 - 1 of 1

4. Scroll down the page until you see FUNDRAISING PAGE SECTION which are assigned to user. Click **Show Detail** on the correct result.

FUNDRAISING PAGES


Include expired pages

| CREATED | PAGE TITLE | EVENT | PAGE TYPE | PAGE TOTAL | TEAM SPLIT | TOTAL | MIN TARGET | PERCENT REACHED | ACTION |
|------------|------------|---|------------|------------|------------|-------|------------|-----------------|------------------------------|
| 30/03/2016 | Ima Test | Cake A Do | Individual | \$000 | \$000 | \$000 | \$100000 | No | Show Details |
| 2/11/2015 | test | Trekking 4 Hope - 7th May 2016 - Birnie Burns | Individual | \$000 | \$000 | \$000 | \$000 | Yes | Show Details |
| 2/09/2015 | Ima Test | ADRA Charity Run 2015 | Individual | \$000 | \$000 | \$000 | \$000 | Yes | Show Details |

Displaying items 1 - 3 of 3

5. Once the Page Details load, scroll to the TRANSACTIONS section and click **Add Transaction**.

PAGE DETAILS



Owner: Ima Test
 Event Name: Birthday
 Page Title: Jess Test
 URL: [Jess-8310227](#)
 Page Type: Individual
 Date Created: 2/04/2020
 Expiration Date: 2/04/2021
 Total Directly Raised: \$12.00

Minimum Raise Target:
 Raise Target:

TRANSACTIONS

6. Fill in form by following the screenshot below:

RECIPIENT

Payer*:

Title*:

First Name*:

Last Name*:

Email*:

Contact Number:

Street Address*:

Suburb*:

Postcode*:

State*:

Country*:

PAYMENT TYPE

Payment Type*:

Transaction Type*:

Amount*:

Customer Reference*:

Notes:

Public:

Include in Total:

Display On Page:

Message (public):

Auto Generate Receipt Number:

*The Fields highlighted in Yellow must adhere to the format as specified

- PAYER: Choose Individual or Organisation
- FIRST NAME and LAST NAME: Of Donor (or just add "Offline" "Donation").

- EMAIL: A receipt/notification will be issued to this email. If you do not need a receipt issued (as in most cases with offline donations) enter a dummy email e.g. offlinedonations@gofundraise.com
 - STREET ADDRESS: Must be **Requested by YOUR NAME on DATE ADDED DD/MM/YYYY**
 - PAYMENT TYPE: **Must always be CASH**
 - TRANSACTION TYPE: **Must always be NON-TAX DEDUCTIBLE**
 - NOTES: This is for any internal notes you would like to add. These appear in transaction reports but not publicly
 - PUBLIC: Disable if the donation is to be Anonymous, otherwise it will display as from FIRST NAME LAST NAME
 - INCLUDE IN TOTAL: If enabled, this amount will be included in the Event Total Raised amount displayed (default is enabled)
 - DISPLAY ON PAGE: If enabled, this amount will appear as a 'Donation' in the Donation Feed of the fundraising page (default is enabled)
 - CUSTOMER REFERENCE NUMBER: Offline Donation
 - Click AUTO GENERATE RECEIPT NUMBER
7. Double check all details, then click CREATE PAYMENT
 8. Visit the Fundraising Page and refresh to view the latest additions
 9. If you have any queries with the following you can contact support@gofundraise.com, with the details of the offline donation and the page it has been added to.

An Event Directly

1. Create a fundraising page under the event labelled e.g. 'Direct Donations'
2. Add your 'event' offline donations to this page
3. If you do not want this page to appear on **Fundraiser Leader boards**, then close the page
4. You can continue to add offline donations to a closed page by the **Shortcut Link** described in the next section

Shortcut Link

1. Visit the fundraising page that you want to add an offline donation to (or locate the page through a Fundraiser Report) and click 'Donate'.
2. The URL should be e.g.
<https://eventname.gofundraise.com/payments/donate/page/931862>
3. Copy the digits at the end of the URL i.e. the **Fundraising Page Identifier**. You can also get the Fundraising Page Identifier from Fundraiser Reports/Transaction Reports
4. Replace **XXXXXX** with the new Fundraising Page Identifier in the 'add transaction' link below, and use the correct **gofundraise domain** for your region:
<https://www.gofundraise.com.au/eventcreator/pages/manage/XXXXXX>

NOTE: gofundraise domain for each region:

US – www.gofundraise.com

AU – www.gofundraise.com.au

NZ – www.gofundraise.co.nz

5. If you need to add donations to a page often (e.g. a closed Fundraising Page that you are using to add direct Event Donations), bookmark the direct 'add transaction' link.