



Offline Donor Naming Conventions

An *Offline Donation* is any donation that is not made Online with a credit card. All cash, cheque, and credit cards that are processed through a POS system are considered an Offline Donation.

When entering an offline donation into EMC (the portal to the online database), ***the true donor name should never be entered***. This is because of the internal receipting processes.

All receipts for Offline Donations are generated from the Vancouver Office from Raiser's Edge.

If a donor name and email is entered into the EMC associated with an offline gift, there is a chance that an online receipt will be automatically generated and sent to the donor if the gift is confirmed, therefore double receipting the donor, which could potentially put our charitable status in jeopardy with the CRA.

The donor name should only be entered in the Recognition Name field.

All Offline Donations are to be entered using the following donor naming conventions:

The same convention can be applied to any and all programs.

First Name = "Program Name" Offline Donor

Last Name = "Location" "Year"

For Example:

First Name: Cops Offline Donor

Last Name: FVR 2016

First Name: R2S Offline Donor

Last Name: FVR 2016

First Name: Daff Dash Offline Donor

Last Name: Surrey 2016

First Name: IFE Offline Donor

Last Name: SIR 2016

First Name: RFL Offline Donor

Last Name: Victoria 2016

First Name: Slopes Offline Donor

Last Name: Whitewater 2016

If an Offline Donor Record for the current program year does not exist when entering a donation, please create one on behalf of your event/region.

As a best practice, all regions/offices should have a current list posted on the server or in the office near the volunteer stations of all the Offline Donor records currently being used. This helps keep the database clean, so new records are not being constantly created.

