ACS CAN Volunteer Guide
to Using Society Donations Batching Tool
for CANRaiser Income

Welcome

Thank you for taking the time to create a CANRaiser page and fundraise on behalf of the American Cancer Society Cancer Action Network (ACS CAN). This document is intended to guide you through the process for submitting donations you receive "offline" (funds were received by you and are in your possession). It will require a partnership with your advocacy coordinator – determined by the state in which you live. You may have already been introduced to your advocacy coordinator by your staff partner, but if you are unsure, please check the assignments below:

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In order to use the Society Donations Batching (SDB) tool, you will need the following:

☐ Computer or mobile device; printer is optional, but preferred

☐ ACS CAN Membership Form(s) – available at fightcancer.org/membershipform, or can be created (which is explained below)

☐ Society Key Coding – provided by your staff partner, or available from your advocacy coordinator

☐ UPS Shipping Label – must be requested from your advocacy coordinator, and should be received before continuing. You must use the provided label for this process.

If you have questions regarding this process, please contact your ACS CAN staff partner or advocacy coordinator. Once again, thank you for your support of ACS CAN!

Donations Processing Glossary

The following are terms used throughout this guide – and throughout the donations processing process:

ACS CAN Membership Form – The form used to capture ACS CAN membership information; any form that states "ACS CAN Membership" and contains the donor's full name, contact information and gift amount.

Batch – The grouping of the donations being processed and other required documents.

Batch Bar Code – A bar code generated by the processing system to identify a unique batch of donations. The bar code can be printed or handwritten on a post-it note if a printer is not available.

Gift Type – How the donor gave their gift: check, credit card or cash.

Package – UPS envelope or box used to ship one or more batches to Shared Services Business Center.

Revenue Category – An internal coding value; always use "Donations Events" for CANRaiser.

Merkle Response Management Group – Centralized processing center that handles ACS CAN (and ACS) donations processing.

Society Key – An alphanumeric string of 6 characters that represents ACS CAN coding, which will be provided by your staff partner, and is also available through your advocacy coordinator (listed above).

Society Donations Batching (SDB) – A computer system used to prepare and record batches being sent to SSBC for processing.

Payment Preparation:

While there are three possible offline payment types, only checks should be submitted through this process. The following explains how to handle each payment type:

Cash
- Convert cash to a money order or check.
  - For those donors that want to be an ACS CAN member, make sure to include an ACS CAN membership form that reflects their information.
  - If the donor does not want to be a member of ACS CAN, a membership form should still be submitted; write "Unallocated" in the last name field and indicate gift amount.
- DO NOT mail cash.

Checks
- Do NOT endorse checks.
- Do NOT deposit checks at bank.
- Do NOT make copies of checks.
- Make sure each check is accompanied with at least one ACS CAN membership form.
  - If one check is intended to cover more than one membership, be sure the forms immediately follow the check.
  - If membership is not desired, the membership form should reflect "Unallocated" in the last name field and the total amount.

Credit Cards

- If a donor wants to donate via credit card, please ask them to enter their credit card on your CANRaiser page, which ensures immediate, secure processing.

Society Donations Batching Tool

The Society Donations Batching (SDB) tool is the system staff and volunteers use for processing ACS CAN (and ACS) income.

Logging Into SDB

SDB can be accessed at **sdb.cancer.org.** *NOTE: Please use Chrome when accessing SDB; it performs better than other internet browsers.*

On the first login to the Society Donations Batching tool, you will receive two prompts.

1. Click **Accept** to the Microsoft prompt that appears. This prompt should only appear on your first login. Subsequent logins will start with step 2.
2. Click the **Volunteer** button and enter your Society Account login information.
   If you have registered for an ACS event (Relay For Life or Making Strides Against Breast Cancer), your login credentials may already exist; use the "forgot password" feature if needed.
   If this is your first time, and you do not have a Society Account login follow these steps:
   i. From the Volunteer login page, click **Create an Account** in the top right corner.
   ii. Choose how you want to create an account
      - If using Facebook or Google, click the icon to go to that external site. Follow the prompts to enter your credentials and login.
      - If using your email address, fill out the fields shown and click on the **Create an Account** button.

During your first login, you will be asked if you want to opt-in for notifications from SDB. These text or email notifications will keep you updated on the status of the batches that you submit as they run through the full process.

Basic Batch Processing

To create a batch using SDB, begin on the **My Batches** home screen and choose **Add Batch.**

Step 1 – Basic Information

1. Enter Total Dollar Amount and, in the Number of Donations field, put the total number of membership forms being submitted.
2. Check the Special Handling box
   - Type "ACS CAN" in the comment box
3. Click **Create Batch.**

Step 2 – Processing Instructions

1. Do not select any option on this screen
2. Click **Next.**

Step 3 – Set Coding Lines

1. Click **Add Society Key**

a. **Enter Society Key** – type in appropriate Society Key (from either your staff partner or advocacy coordinator).
   b. Click anywhere outside the box and the name associated with the Society Key will appear.
   c. Restriction – this field will default to a preset restriction for each key; do not change it.
   d. **Select Revenue Category** – choose Donations Events.
   e. **Select Event Year** – Choose the current calendar year.
2. Click **Save.**
3. Confirm the coding shown is correct and click **Next** to continue.

Step 4 – Balance Batch
1. Confirm the amount in **By Amount** matches the total for this batch.
2. Do not enter an amount in the Fair Market Value column
3. Click **Next.**

Step 5 – Set Tracking
1. Select UPS as your shipping method
2. **Enter Package Tracking Number**, if available. This can be added later if not available at the time you are entering batch information.
3. Leave Bank Name and Deposit Number fields blank.
4. Click **Print Barcode** (even if you do not have a printer).
5. When the barcode appears, you have two options.
   i. If a printer is available, click **Print**. This printed barcode goes on top of the check(s). If you are unable to get the barcode to print completely, write the barcode combination (letters and numbers) on a piece of paper, along with the word "Barcode" (so it will be clear that's what it is) and place it on top of the check(s) and membership form(s).
   ii. If a printer is NOT available, write the barcode combination (letters and numbers) on a piece of paper and place it on top of the check(s) and membership form(s).

Click the **X** in the top right corner of the barcode to return to the previous screen.
6. Click **Submit Batch** and a popup box will appear, indicating the batch has been submitted.

Step 6 – Mailing the Package to Merkle Response Management Group
1. Print shipping label provided by your advocacy coordinator (it will be sent by email, unless you have specifically requested for it to be mailed to you). Each label will be pre-populated with ACS CAN as the Sender and Merkle Response Management Group as the Recipient. Please add your name in the sender area.
2. You can use any envelope that can accommodate the shipping label.
3. Put your checks and membership forms in the envelope.
4. Seal the envelope and securely attach/tape the pre-printed shipping label on the front of the envelope.
5. Go online to ups.com/locations to determine the best location for you to drop your package. (Note that UPS has drop-boxes as well as storefront locations)

6. Share the tracking number and log of batches – as well as any other information -- with your staff partner.