



## DONATION DIRECTOR






### Entering a Donation

To enter a donation, first open up Transaction Wizard.

Upon entry you will see this screen and you need to click on **Next**

**Transaction Wizard Batch Screen**

Batch Number	Fiscal Year	Control Number	Batch Date	Is Posted	Entered By	Entered Date
* (New Batch)	▼			<input type="checkbox"/>	admin	7/7/2009 11:23:51 AM

Double check your **Fiscal Year**, enter a **Batch Date** and **Control Number** (this can be used as an inhouse numbering system, this item does not need to be used)

Click on **Save/Next**

**Transaction Wizard Batch Screen**



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




**New Batch**

Fiscal Year:

Batch Date:

Control Number:

 Cancel
 Save/Next



Enter the first three letters of the last name or the first three of the business name in the **Search For** box.

In this case we are looking for Bayne so I have entered Bay and clicked on **Search**

Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009

**Step #1 - Select Account**

Search For:       In Field:        Starts With       Contains     

Include:  Individuals     Businesses     Fund Accounts     Relationships

Account:	Account#:	<input type="button" value="Add New"/>
Address:	Phone:	<input type="button" value="Edit"/>
	Email:	

**Step #2 - Select Transaction Type**

Record a New Payment Associated with an Existing Pledge  
 Record a New Donation  
 Record a New Pledge

Previously Entered Transactions      Show All Prior Pledges       Show All Prior Donations

Posted	Batch#	Fiscal Year	Tran. Type	Tran. Date	Ack. Amount	A/R Amount	Paid To Date	Last Pmt. Date

As you can see in the example four names came up three were blue (these are related accounts) and I have highlighted the black one for Bayne, Don and I will click on **Select**

Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009

**Step #1 - Select Account**

Search For:       In Field:        Starts With       Contains     

Include:  Individuals     Businesses     Fund Accounts     Relationships

Acct. Type	Account No:	Search Name	Related To Account	Street Address	City	State	Zip Co
Child		Bayne, Austin	Bayne, Don				
Business C		Bayne, Don	Cascade Data Solutions				
Individual		Bayne, Don		3410 Takena SW	Three Hills	NE	34647
Spouse		Bayne, Don	Springer, Rhonda				



In the following screen you will select whether you are adding a payment on pledge, a donation or a pledge.

You are also able to edit the donors account if needed by clicking on **Edit**, this will take you out to Account Manager you can make your changes and then when you save will bring you back to this screen.

In this case I will click on **Record a new Donation** and click **Next**

Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009

**Step #1 - Select Account**

Search For: bay      In Field: Account Name       Starts With       Contains     

Include  Individuals     Businesses     Fund Accounts     Relationships

Account: Bayne, Don      Account#      **Add New**

Address: Don Bayne      Phone: (555) 924-5714      **Edit**

3410 Tadena SW      Email: dbayne@duh.com

Three Hills, NE 34647

**Step #2 - Select Transaction Type**

Record a New Payment Associated with an Existing Pledge

**Record a New Donation**

Record a New Pledge

Previously Entered Transactions      Show All Prior Pledges       Show All Prior Donations

Posted	Batch#	Fiscal Year	Tran. Type	Tran. Date	Ack. Amount	A/R Amount	Paid To Date	Last Pmt. Date
Yes	1	2008	Pledge	2/5/2008	\$5,000.00	\$5,000.00	\$1,000.00	3/10/2009

**Close**      **Previous**      **Next**

When entering this screen it will be blank and you will need to fill out the fields. Most are drop down fields that you have already created in System Setup or Appeal Manager.

Some fields do not need to be filled out but I have given you an example of those that would need to be.

If you want to send a thank you letter make sure the Acknowledge box is checked and a letter is chosen.

For more information on any of these fields please give us a call.

When complete click **Save/Next**

Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009      ID# 6470

**Step #3 - Enter Transaction Information**

Donation Type: Check      Anonymous Gift       Bayne, Don

Received On: 7/7/2009      Counts As: 1      Short Note | Custom Fields | Memo

Acknowledged Amt: \$50.00      Received Amt: \$50.00      Tax Value: \$50.00      Tax Receipt Method: Annual Tax Receipt

Check No#: 1234      Transaction Solicitor: Almgran, Diana

Check Date: 7/5/09      Dedication:

**Step #4 - Enter Appeal Source and Designation**

Appeal Name: Capital Campaign      Add'l Appeal      Soft Credit Amt: 0.00 **SC**

Appeal Category: General Donation      Delete Appeal

Appeal Ack. Amt: \$50.00      Appeal Tax Value: \$50.00      Designation:

Appeal Recvd Amt: \$50.00      Category Count:      Acknowledge       OneCampaign.Doc

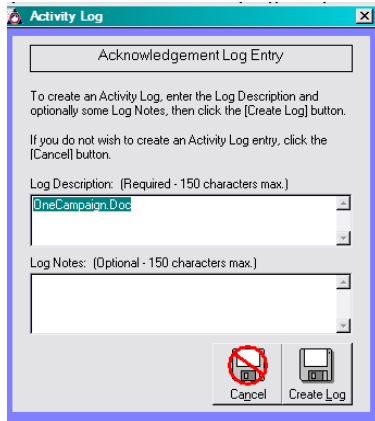
Appeal Name	Ack. Amt	Recvd. Amt	Tax Value	Send	Acknowledgement Letter
Capital Campaign - General Do	\$50.00	\$50.00	\$50.00	<input checked="" type="checkbox"/>	OneCampaign.Doc
Total	\$50.00	\$50.00	\$50.00	<input type="checkbox"/>	

**Link**      **Close**      **Previous**      **Save/Next**



At this screen you are able to print out your letter simply by clicking on **Print/Send**

Reminder: If you do print out your letter Create the log to let Donation Director know the letter has been printed.



Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009      ID# 6470

**Step #5 - Print Correspondence Letters**

**Acknowledgement**

Send a Letter       Send an Email

Use Primary Address

Address Use       Month

Don Bayne  
3410 Takena SW  
Three Hills, NE 34647

**Tax Receipt**

Send a Letter       Send an Email

Use Primary Address

Address Use       Month

Don Bayne  
3410 Takena SW  
Three Hills, NE 34647

**Letters To Print / Email**

Letter Name	Correspondence Method	Letter Type
OneCampaign.Doc	Send a Letter	Acknowledgement

**Activity Log**

Log Date	Log Description	Letter Type	Activity Log Notes	Output Sent

The list of pre-assigned correspondence letters was created from the letters you assigned to this transaction on the previous screen. Click on the row then click [Print/Send]. You can click the [Previous] button to assign or re-assign another letter.

Or if you prefer to enter more transaction just click on **Next** and repeat the above steps till you have all your transactions entered.

You can then print your Acknowledgements out of Correspondence Wizard after posting the batch.

See Posting a Batch to finalize the process of entering Transactions

Batch No: 2      Batch Date: 7/7/2009      Control No:      Fiscal Year: 2009

Tran. ID.	Tran Group	Tran. Date	Account Name	Ack. Amount	Tran. Type	Notes
6470	Donation	7/7/2009	Bayne, Don	\$50.00	Check	

**Review**

= Waiting on Credit Card Processing      = A Re-Occurring Pledge