



DONATION DIRECTOR






Entering a Pledge

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



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






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				



Entering a Pledge

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 Pledge** and click **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.

The next step will be to fill out the reminder schedule, click on **Create Schedule**



This is a normal pledge with a reminder that we have set up starting with today's date, set to remind every month for the next 12 months.

When finished with setting up the reminder click on **Save/Close**

Batch No: 2 Batch Date: 7/7/2009 Control No: Fiscal Year: 2009 ID# (New)

Step #3 - Enter Transaction Information Bayne, Don

Pledge Type: Bill Me Is a Reoccurring Pledge: Short Note | Custom Fields | Memo

Received On: 7/7/2009

Acknowledged Amount: Reoccurring Frequency: Never

Receivable Amount: Payments Received: \$0.00 Next Reoccurring Date: Termination Date: Delete Reminder Schedule Create Reminder Schedule

CC#: Reminder Start Date: 7/7/2009 Reminder Frequency: Every Month Installments: 12

Expires On: Transaction Solicitor: Aln

Step #4 - Enter Appeal S

Appeal Name: Capital C Appeal Category: General Appeal Ack. Amt.: \$ Appeal A/R Amt.: \$

Reminder Date	Reminder Amt.	Reminder No#	Past Due Reminder
7/7/2009	\$100.00		<input type="checkbox"/>
8/7/2009	\$100.00		<input type="checkbox"/>
9/7/2009	\$100.00		<input type="checkbox"/>
10/7/2009	\$100.00		<input type="checkbox"/>
11/7/2009	\$100.00		<input type="checkbox"/>
12/7/2009	\$100.00		<input type="checkbox"/>
1/7/2010	\$100.00		<input type="checkbox"/>
2/7/2010	\$100.00		<input type="checkbox"/>
3/7/2010	\$100.00		<input type="checkbox"/>
4/7/2010	\$100.00		<input type="checkbox"/>
5/7/2010	\$100.00		<input type="checkbox"/>
6/7/2010	\$100.00		<input type="checkbox"/>
*			<input type="checkbox"/>

Scheduled A/R Reminder Total: \$1,200.00

Cancel Save/Close

If you have a pledge that is to re-occur for the same amount year after year or month after month you will need to check the **Is a Reoccurring Pledge** box on the prior screen to opening the Create Schedule.

When you do open it you will see that the Reoccurring Frequency fields are now available. You will need to choose how often you want the reoccurance to happen.

When finished **Save/Close**

And now **Save/Next**

Batch No: 2 Batch Date: 7/7/2009 Control No: Fiscal Year: 2009 ID# (New)

Step #3 - Enter Transaction Information Bayne, Don

Pledge Type: Bill Me Is a Reoccurring Pledge: Short Note | Custom Fields | Memo

Received On: 7/7/2009

Acknowledged Amount: Reoccurring Frequency: Every Year

Receivable Amount: Payments Received: \$0.00 Next Reoccurring Date: 7/7/2010 Termination Date: Delete Reminder Schedule Create Reminder Schedule

CC#: Reminder Start Date: 7/7/2009 Reminder Frequency: Every Month Installments: 12

Expires On: Transaction Solicitor: Aln

Step #4 - Enter Appeal S

Appeal Name: Capital C Appeal Category: General Appeal Ack. Amt.: \$ Appeal A/R Amt.: \$

Reminder Date	Reminder Amt.	Reminder No#	Past Due Reminder
7/7/2009	\$100.00		<input type="checkbox"/>
8/7/2009	\$100.00		<input type="checkbox"/>
9/7/2009	\$100.00		<input type="checkbox"/>
10/7/2009	\$100.00		<input type="checkbox"/>
11/7/2009	\$100.00		<input type="checkbox"/>
12/7/2009	\$100.00		<input type="checkbox"/>
1/7/2010	\$100.00		<input type="checkbox"/>
2/7/2010	\$100.00		<input type="checkbox"/>
3/7/2010	\$100.00		<input type="checkbox"/>
4/7/2010	\$100.00		<input type="checkbox"/>
5/7/2010	\$100.00		<input type="checkbox"/>
6/7/2010	\$100.00		<input type="checkbox"/>
*			<input type="checkbox"/>

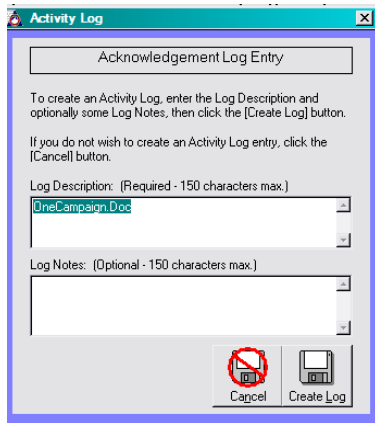
Scheduled A/R Reminder Total: \$1,200.00

Cancel Save/Close



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
6441	Pledge	7/7/2009	Bayne, Don	\$1,200.00	Bill Me	

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