




DONATION DIRECTOR


Posting a Batch


After entering transactions you will have created a batch that will look similar to this when first entering Transaction Wizard


Transaction Wizard Batch Screen


Batch Number	Fiscal Year	Control Number	Batch Date	Is Posted	Entered By	Entered Date
1	2009		3/10/2009	<input type="checkbox"/>	admin	5/6/2009 6:46:32 AM
* (New Batch)				<input type="checkbox"/>	admin	7/7/2009 1:05:49 PM


Review


Retrieve


Delete


Close



Next


Or may look like this if you are inside of the batch.


From either place you can post the batch. Click on Review


Batch No: 1
Batch Date: 3/10/2009
Control No:
Fiscal Year: 2009


Tran. ID.	Tran Group	Tran. Date	Account Name	Ack. Amount	Tran. Type	Notes
6413	Pledge	3/10/2009	Williams, Fred	\$1,000.00	Bill Me	
6410	Donation	3/10/2009	Cascade Data Solutions	\$150.00	In Kind	Gift Certificate
6407	Donation	3/10/2009	Rattley, Norma	\$50.00	Cash	
6404	Donation	3/10/2009	Shear Impressions	\$200.00	In Kind	Spa Certificate
6392	Pledge	3/10/2009	Harlan Auto Sales	\$5,000.00	Bill Me	
6388	Donation	3/10/2009	Johnson, Laverne	\$50.00	Mastercard	
6385	Donation	3/10/2009	Hall, Jack	\$200.00	Cash	
6383	Payment	3/10/2009	Bayne, Don	\$500.00	Check	
*						


 = Waiting on Credit Card Processing


 = A Re-Occurring Pledge



Review



Make Pmts.


Reoccur.


Delete


Close


Previous


Next



The following screen will come up and you can Preview or Print your Batch Report.

When you are satisfied with your batch you simply click on **Post Batch**

Transaction Wizard Batch Screen

Batch Number	Fiscal Year	Control Number	Batch Date	Is Posted	Entered By	Entered Date
1	2009		3/10/2009	<input type="checkbox"/>	admin	5/6/2009 6:46:32 AM
* (New Batch)				<input type="checkbox"/>	admin	7/7/2009 1:05:49 PM

Post Batch

Batch Number

Control Number

Batch Date

Pledge Total	<input type="text" value="\$6,000.00"/>	Pledge Count	<input type="text" value="2"/>
Pledge Payment Total	<input type="text" value="\$500.00"/>	Payment Count	<input type="text" value="1"/>
Donation Total	<input type="text" value="\$650.00"/>	Donation Count	<input type="text" value="5"/>
Batch Total	<input type="text" value="\$7,150.00"/>	Transaction Count	<input type="text" value="8"/>

Batch Report - Summary Batch Report - Detailed

Options:

Show Custom Fields Show Acknowledge As instead of Account Name

Selecting this option will display the Acknowledge As field and display Anonymous Donors and Gifts as Anonymous

Post Batch

Print

Preview

Close

You will be brought back to the Batch Screen and you're transactions are now posted and Acknowledgements or Reminders are available for printing out of Correspondence Wizard.

Reminder: It is not necessary to unpost a batch to make changes to a transaction. Please call us to discuss optional corrections.

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 1:10:49 PM

Review

Retrieve

Delete

Close

Next