



D ONATION DIRECTOR

Credit Card Input and Processing - Using X-Charge

Entering a Credit Card Donation

Start a new batch or continue with an existing batch.

Transaction Wizard Batch Screen

Batch Number	Fiscal Year	Control Number	Batch Date	Is Posted	Entered By	Entered Date
10	2008		4/22/2008	<input type="checkbox"/>	admin	4/22/2008 10:03:57 AM
* (New Batch)				<input type="checkbox"/>	admin	12/31/2008 7:15:37 AM

New Batch

Fiscal Year:

Batch Date:

Control Number:

Enter an account and record a new donation.

Batch No: 21 Batch Date: 12/31/2008 Control No: Fiscal Year: 2008

Step #1 - Select Account

Search For: In Field: Starts With Contains

Include: Individuals Businesses Fund Accounts Relationships

Account: Gehring, Nicole **Account#**

Address: Nicole Gehring **Phone:** (No Phone On File)

4778 Burns Ave

Three Hills, NE 34647 **Email:** (No Email On File)

Step #2 - Select Transaction Type

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

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



Choose your type of credit card e.g., Visa, MasterCard, EFT/Debit, enter your acknowledged, received and tax value amounts.

Batch No: 21 Batch Date: 12/31/2008 Control No: Fiscal Year: 2008 ID# (New)

Step #3 - Enter Transaction Information

Donation Type: Anonymous Gift: Short Note:

Received On: Counts As:

Acknowledged Amt.: Received Amt.: Tax Value: Tax Receipt Method:

CC#: Approved: Expires On: Run the CC: Approval No.: Dedication:

Step #4 - Enter Appeal Source and Designation

Appeal Name: New Appeal: Soft Credit Amt.:

Appeal Category: Delete Appeal:

Appeal Ack. Amt.: Appeal Tax Value: Designation:

Appeal Recvd Amt.: Category Count: Acknowledge:

Appeal Name	Ack. Amt	Recvd. Amt	Tax Value	Send	Acknowledgement Letter

Link Close Previous Save/Next

Notice when you tab off of the tax value amount a new button has appeared, **Run the CC**

Click on this button and the X-Charge screen will appear. Enter the fields required and process.

Batch No: 21 Batch Date: 12/31/2008 Control No: Fiscal Year: 2008 ID# (New)

Step #3 - Ent X-Charge 7.0 (223499) Gehring, Nicole

Donation:

Received: Acknowledged: Received: Tax: CC#: Expires On:

Step #4 - Enter

Appeal Name: Appeal Category: Appeal Ack. Amt.: Appeal Recvd Amt:

Credit Card - Purchase

Amount: Credit Card #: Expiration (MMYY):

* ZIP Code: * Address: * CW2/CVC2:

* Receipt #: * Clerk ID:

[F12] Process

7.0.1 Beta 2

Scan credit card or enter credit card number

Link Close Previous Save/Next



As you will notice you have an Approval number (or message).

You can now add for your information the expiration of the credit card and proceed with the entry of the donation as you normally would.

Batch No: 21 Batch Date: 12/31/2008 Control No: Fiscal Year: 2008 ID# (New)

Step #3 - Enter Transaction Information

Donation Type: Anonymous Gift: Short Note: Custom Fields: Memo:

Received On: Counts As:

Acknowledged Amt.:

Received Amt.:

Tax Value:

CC#: Approved: Tax Receipt Method:

Expires On: Run the CC: Approval No.: Dedication:

Step #4 - Enter Appeal Source and Designation

Appeal Name: New Appeal: Soft Credit Amt.:

Appeal Category: Delete Appeal:

Appeal Ack. Amt.: Appeal Tax Value: Designation:

Appeal Recvd Amt.: Category Count: Acknowledge:

Appeal Name	Ack. Amt	Recvd. Amt	Tax Value	Send	Acknowledgement Letter