Entering Contributions

Contents

Overview

Open the donor's record and click on their **Contribute** tab.

Click the **New** button. *If the **New** button is not enabled, it means you have just created this donor and you need to save the record before continuing.*
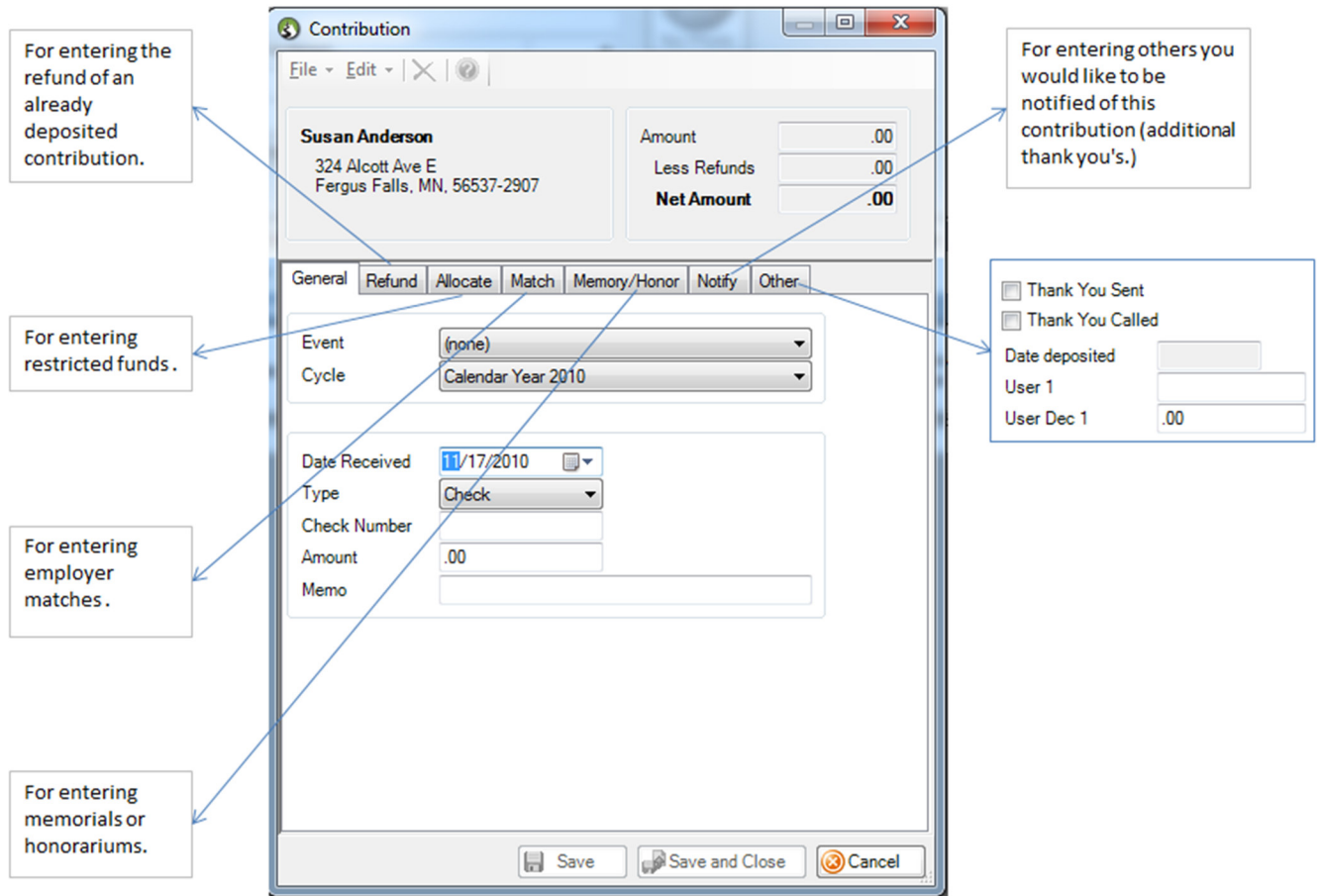
Screen parts diagram:

For entering the refund of an already deposited contribution.

For entering restricted funds.

For entering employer matches.

For entering memorials or honorariums.

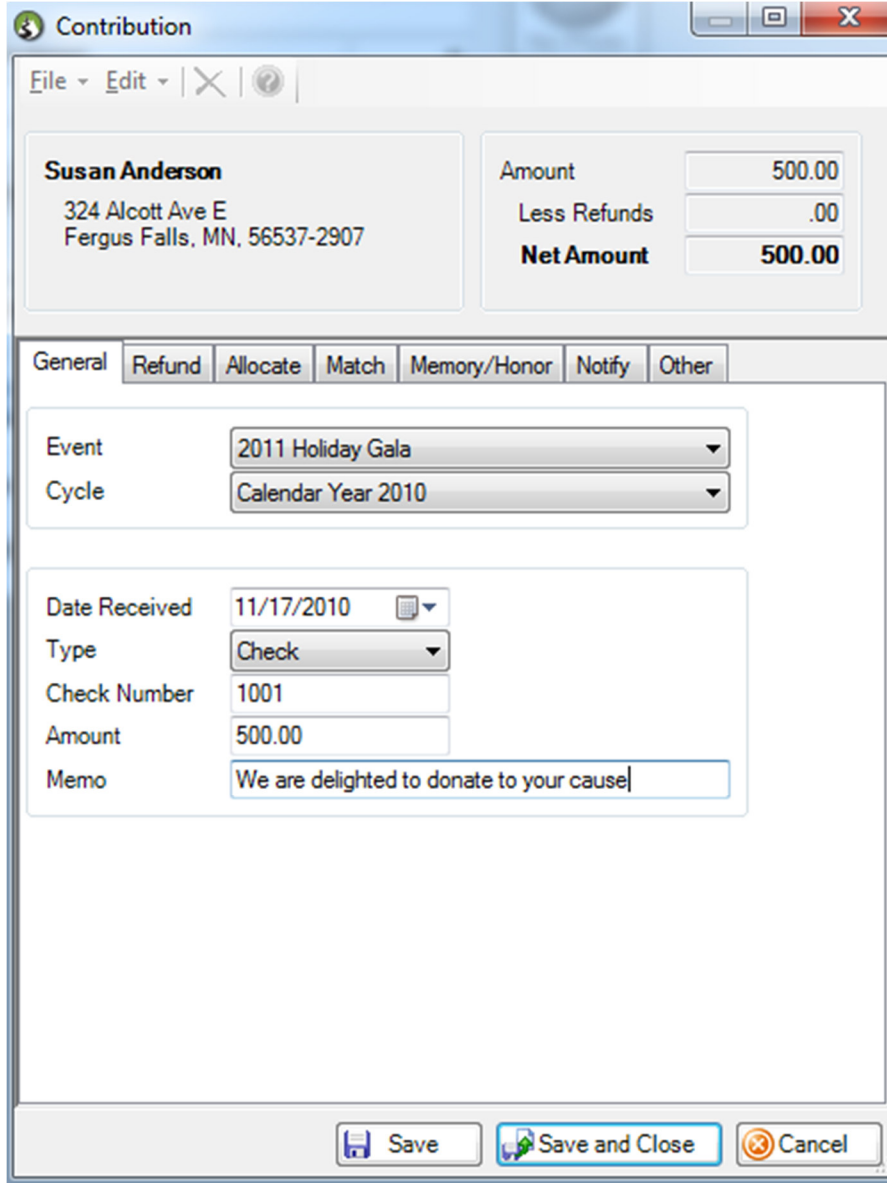**For entering others you would like to be notified of this contribution (additional thank you's.)**

Most of your data entry will occur on the General tab only. This tab holds the event, cycle (election if political), date of the contribution, payment type, check number, amount, and the check memo.

Simple Contribution Data Entry (Date, Amount, Event)

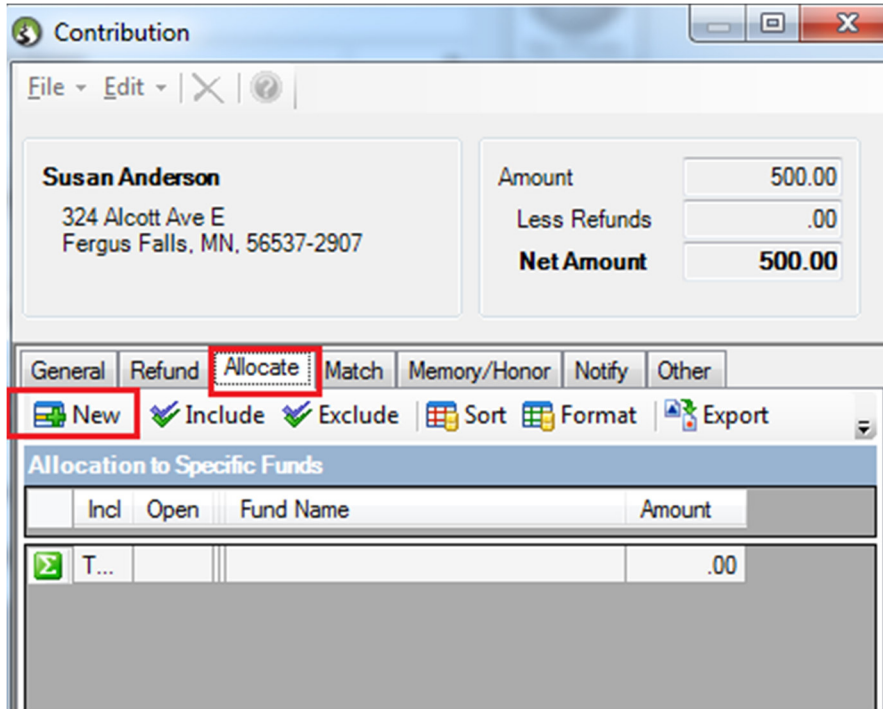Complete the General tab. Date and amount are the minimum required fields.

Restricting the Contribution to a Specific Fund

Select the **Allocate** tab and click the **New** button.
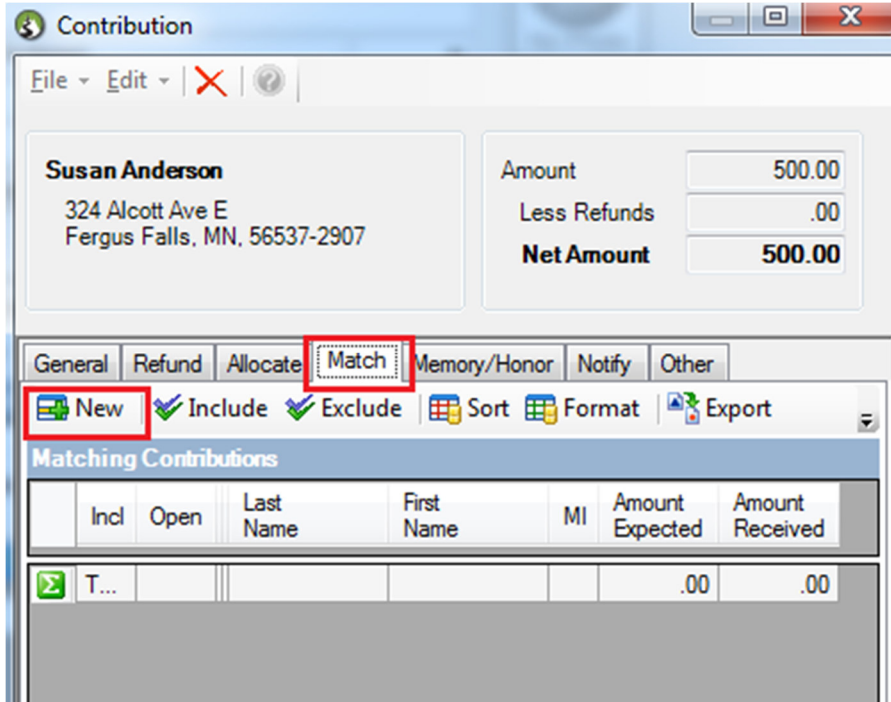

Enter the name of the fund[1] from the drop down menu to which you want to restrict the funds. Enter the amount if it is different from the full contribution amount. Click the **OK** button.
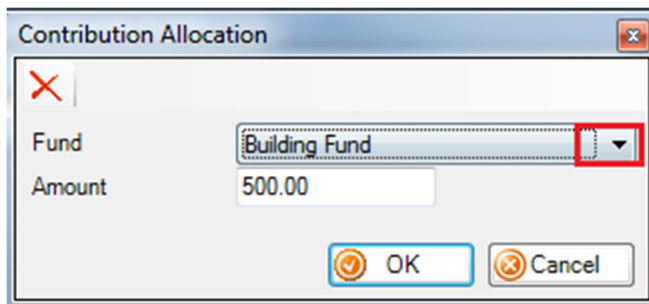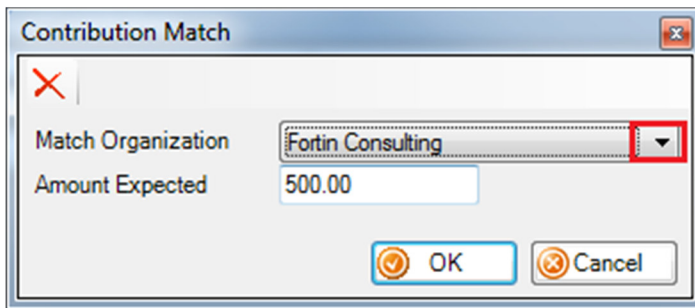

[1] See Appendix A for information to add new funds.

Enter Employer Matching

Select the Match tab and click the **New** button.

Enter the name of the Matching Organization[2] from the drop down menu to which you want to indicate the matching organization. Enter the amount if it is different from the full contribution amount. Click the **OK** button.
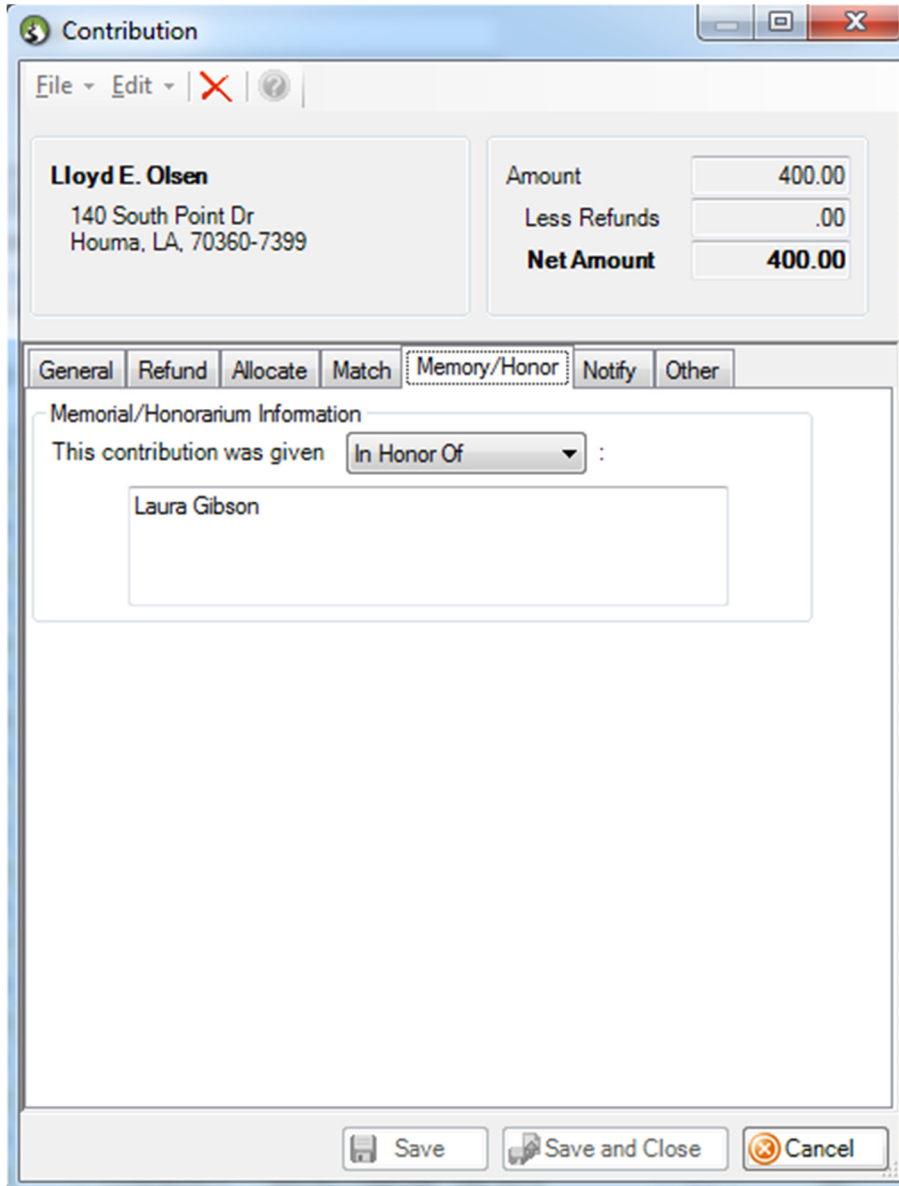

[2] See Appendix B for information on how to configure a donor to accept matching donation request.

Enter Memorials and Honorariums

Select the **Memory/Honor** tab.
From the drop down box select **In Honor Of** or **In Memory Of**.
In the space provided enter the name. This is a free text field. Click **Save**.
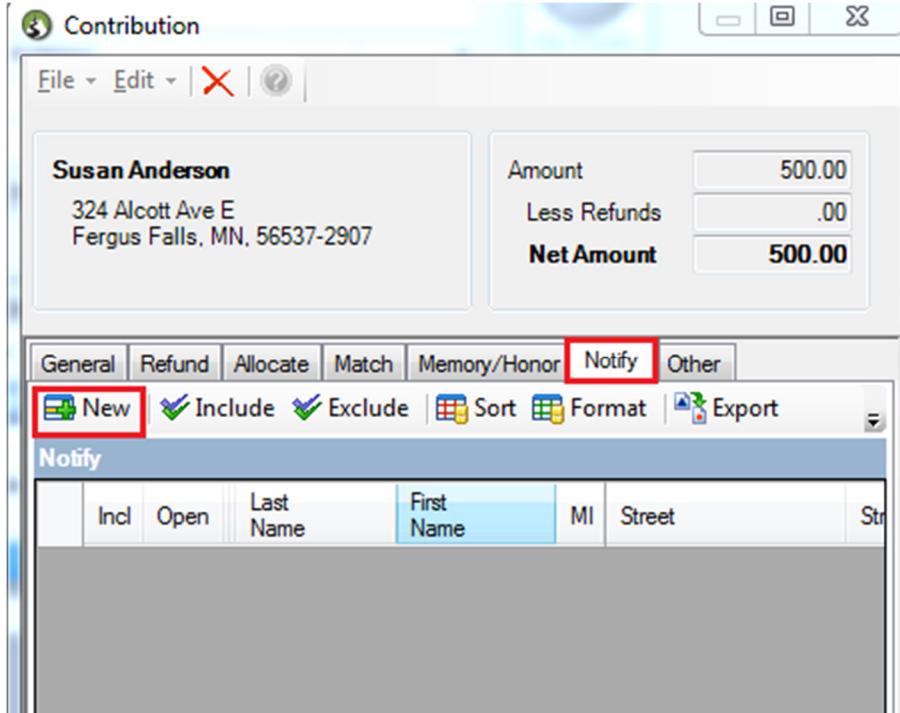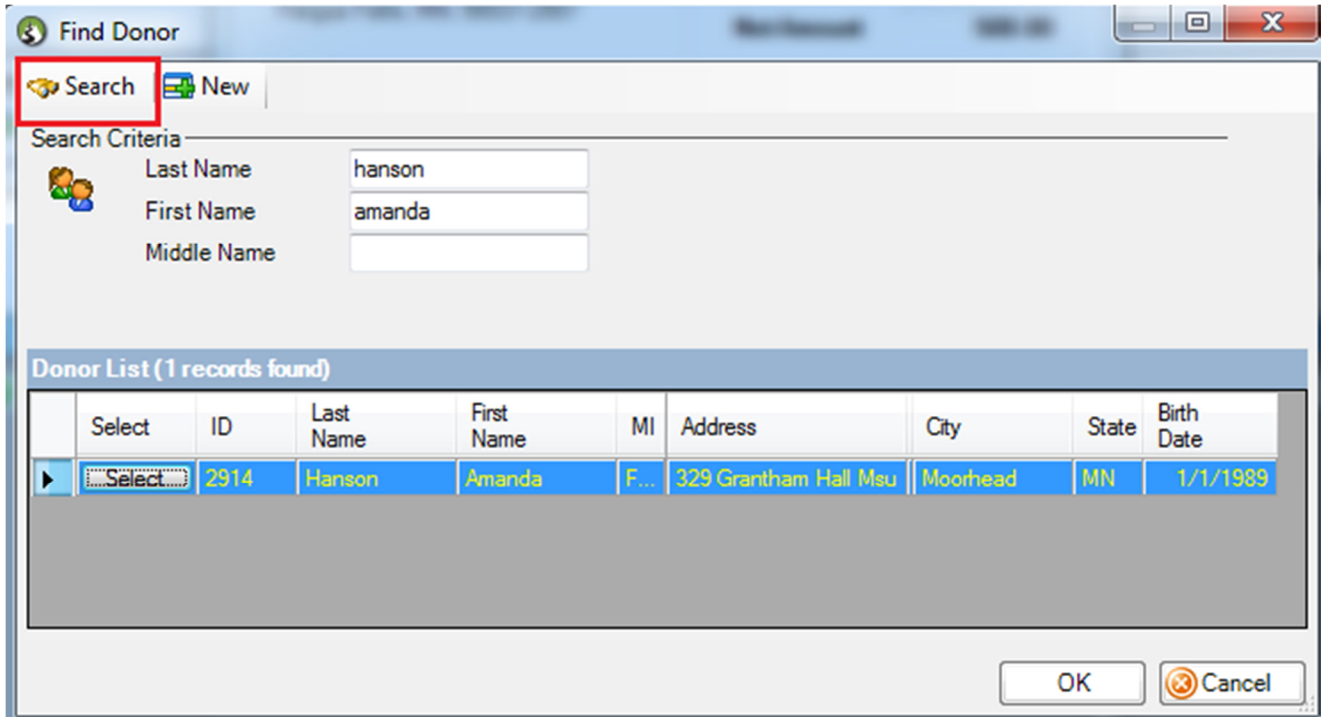
Enter Additional Notifications of the Contribution (thank you's typically)

You may want to thank additional people or organizations for this contribution.
Select the Notify tab and click the **New** button.

If the person/org exists in the database:

Enter the search criteria then click the **Search** button.
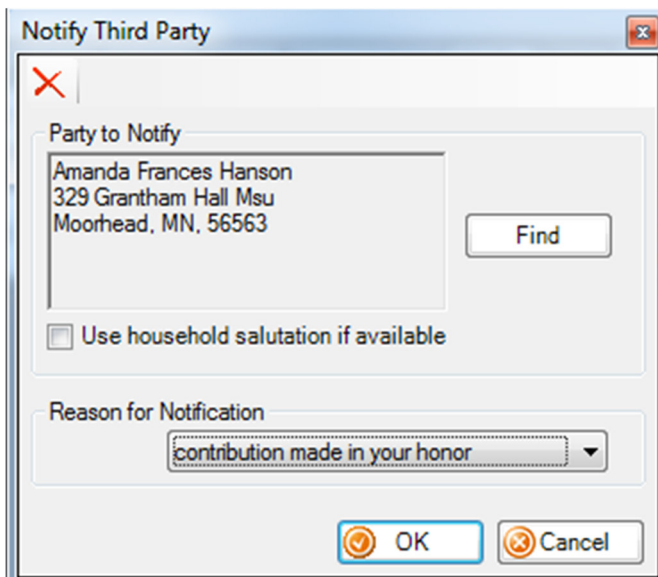
Once found, click the **Select** button.

☑ **Use household salutation if available**

Check this box if you want to address the notification to all members of the household.   This is specifically related to the merge letter and the merge fields.
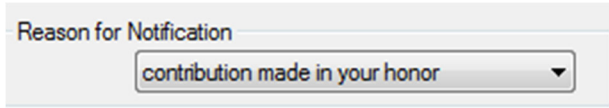
This will assist you in determining what type of letter you are sending.   The choices as they exist as of this writing are:
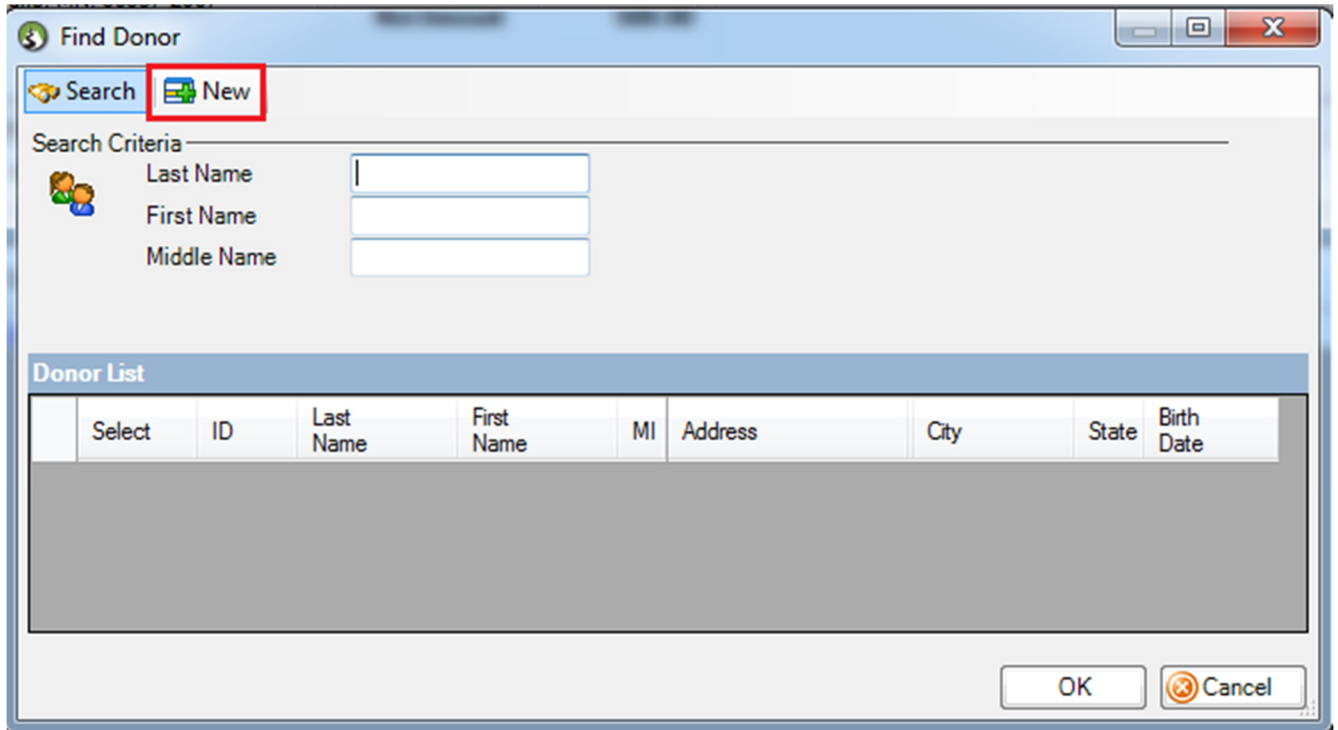

These options are referenced in the **Contribution Notifications** search panel:
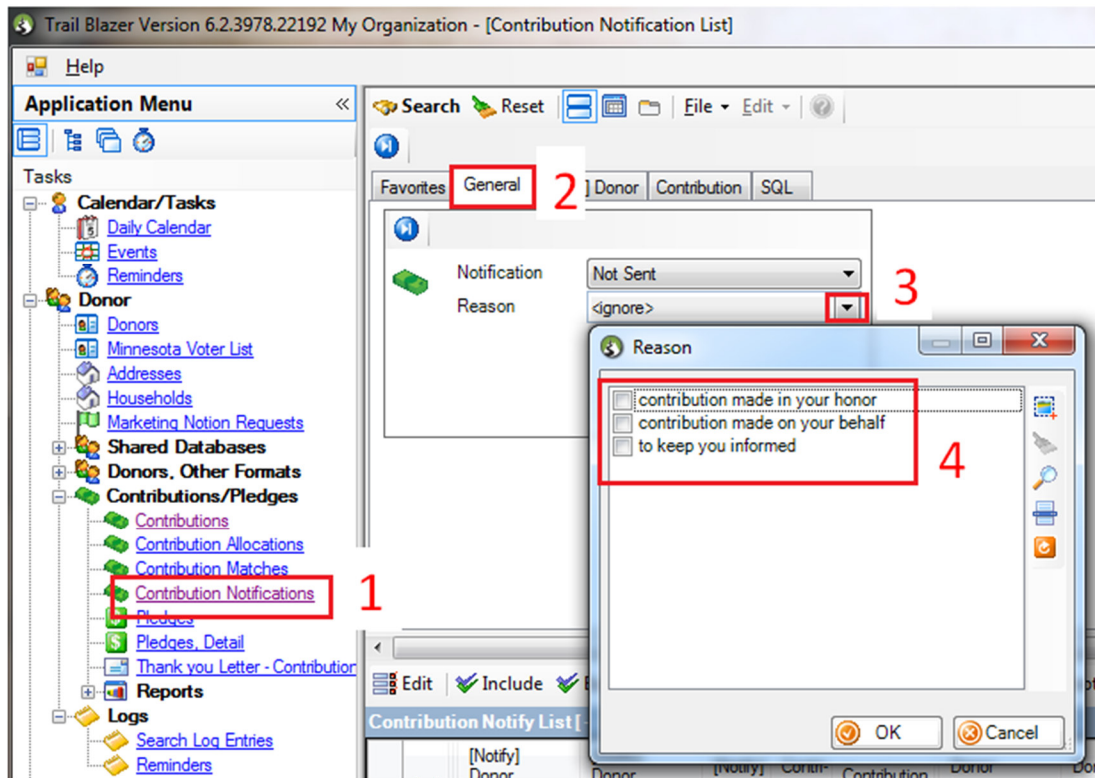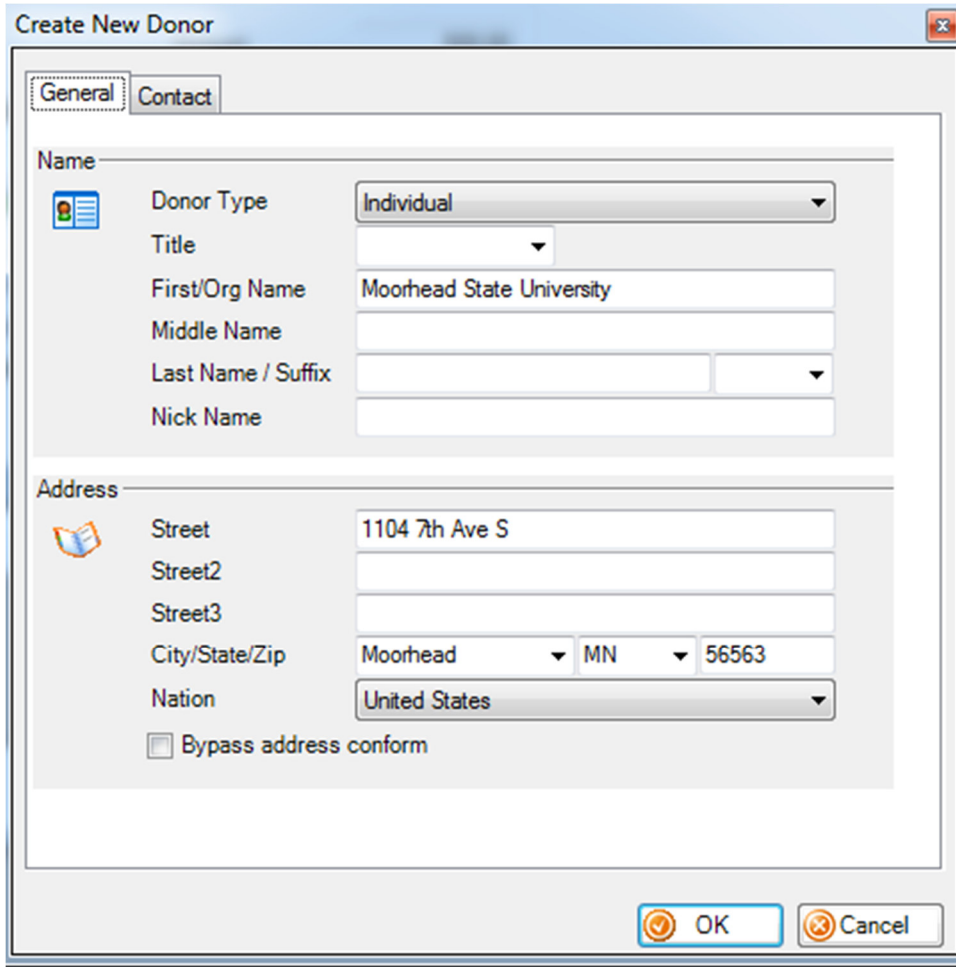
If the person/org DOES NOT exist in the database:

Click the **New** button.

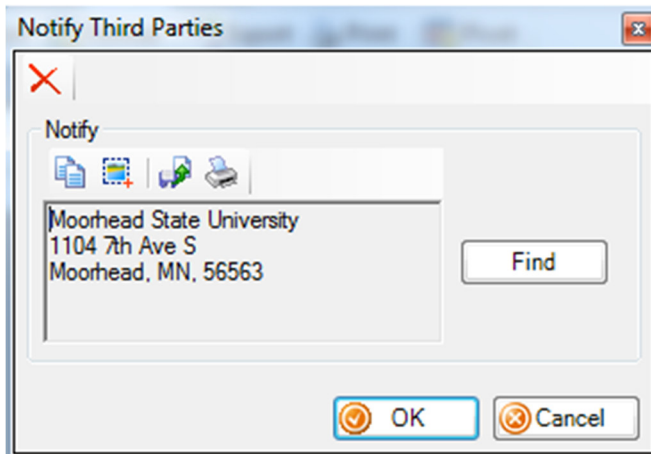Enter the name and address for the new donor record and click **OK**.

Click **OK** on the Notify Third Parties dialog box to add this new donor to the Notify tab.

The results in this example look like this:
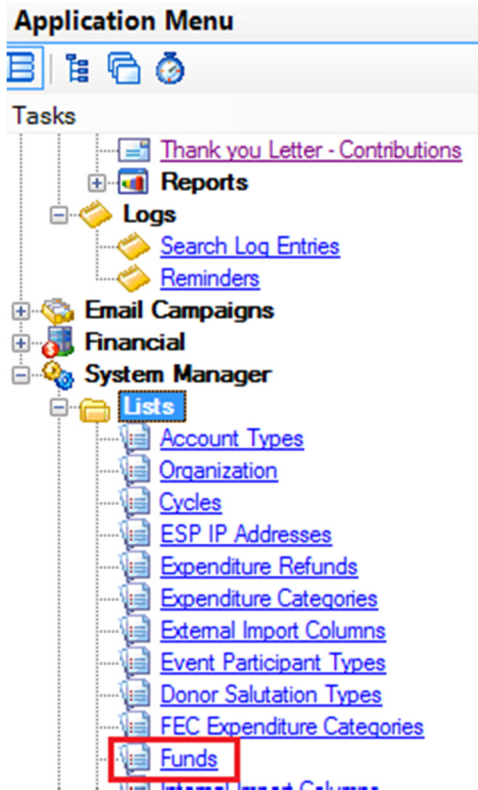
(Reminder) - Save Periodically

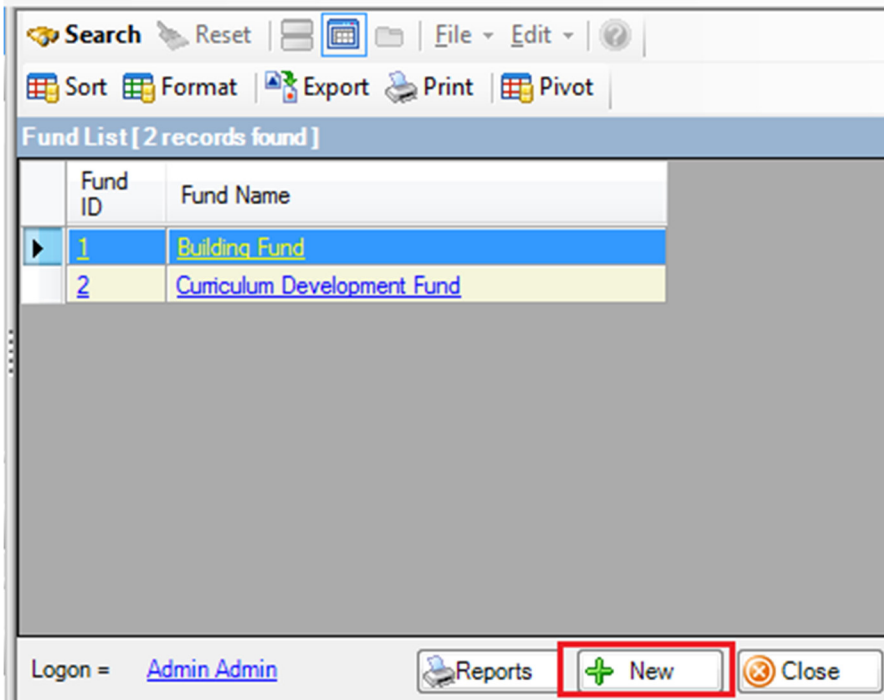Be sure to SAVE your work as needed.
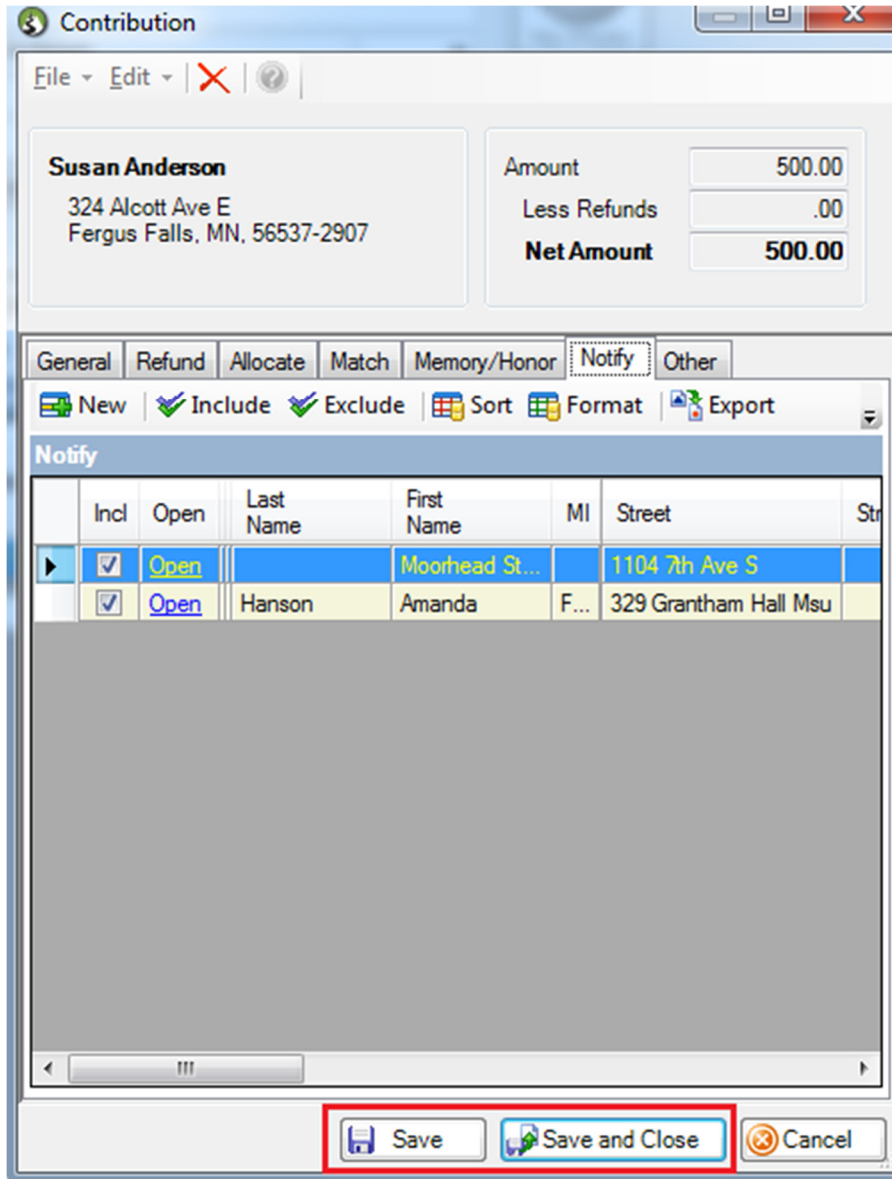
Appendix A
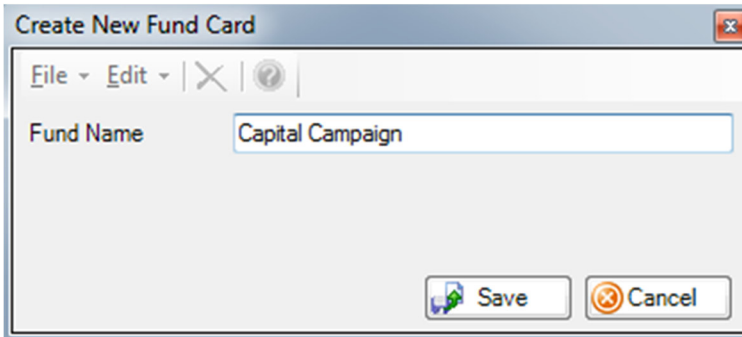
Setting Up a Fund – Create a New Fund Item

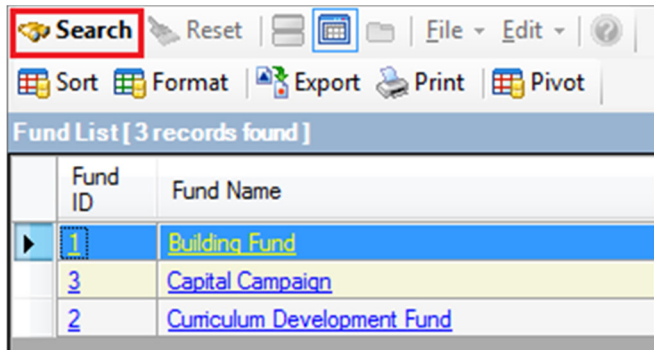Select **Funds** from the **Lists** menu in **System Manager**.

Click the **New** button.

Enter the new fund name and click **Save**.

Click **Search** to refresh the list.

Appendix B

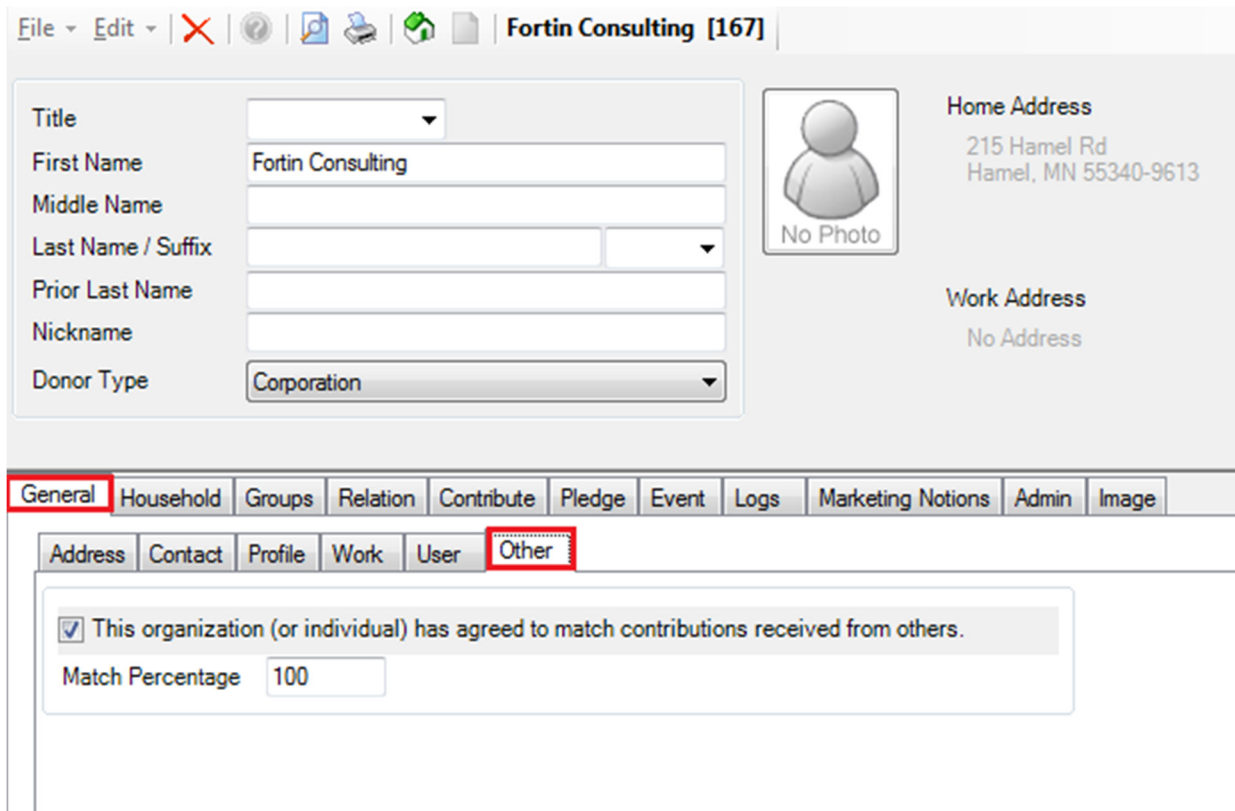## Identifying Matching Organizations

Open the donor organization record.

Select the **Other** tab under the **General** tab.

Check the box indicating this organization will match contributions of other donors (usually employees, but not restricted to only employees).

Enter the *default* matching percentage. This can be overridden at the time of data entry.

Click **Save**.