

Entering Contributions



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Overview

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

Susan Anderson [260]

Title: Mr & Mrs
 First Name: Susan
 Middle Name:
 Last Name / Suffix: Anderson
 Prior Last Name:
 Nickname:
 Donor Type: Individual

Home Address: 324 Alcott Ave E, Fergus Falls, MN 56537-2907
 Work Address: No Address

General | Household | Groups | Relation | **Contribute** | Pledge | Event | Logs | Marketing Notions | Admin | Image

Address | Contact | Profile | Work | User | Other

New | Current Addresses Only | Mapquest

Main Home, Default Display, Mailing, Registration

324 Alcott Ave E
 Fergus Falls, MN 56537-2907

Type: General | District | User | Donors

Home | Work | Default Display
 Main | Main | Mailing
 Other | Other | Registration

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.*

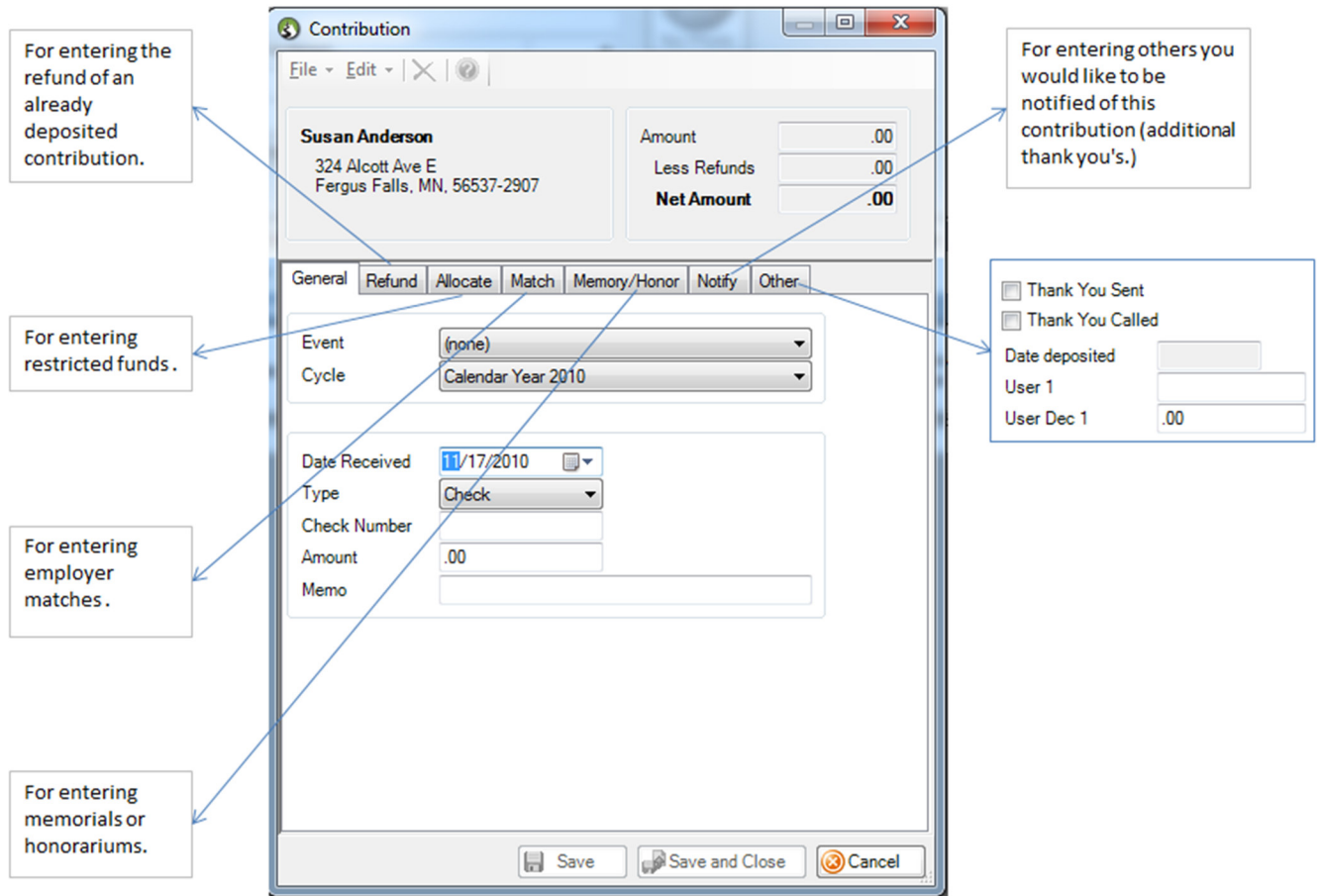
General | Household | Groups | Relation | **Contribute** | Pledge | Event | Logs | Marketing Notions | Admin | Image

New | Include | Exclude | Sort | Format | Export | Print

Contributions [0 records found]

Incl	Open	Date	Amount After Refunds	Cycle	De-posit-ed	Applied Against Pledges	Matches Expected	Allocated to Specific Funds	Mem/Hon Type	Mem/Hon Person
	T...		.00			.00	.00	.00		

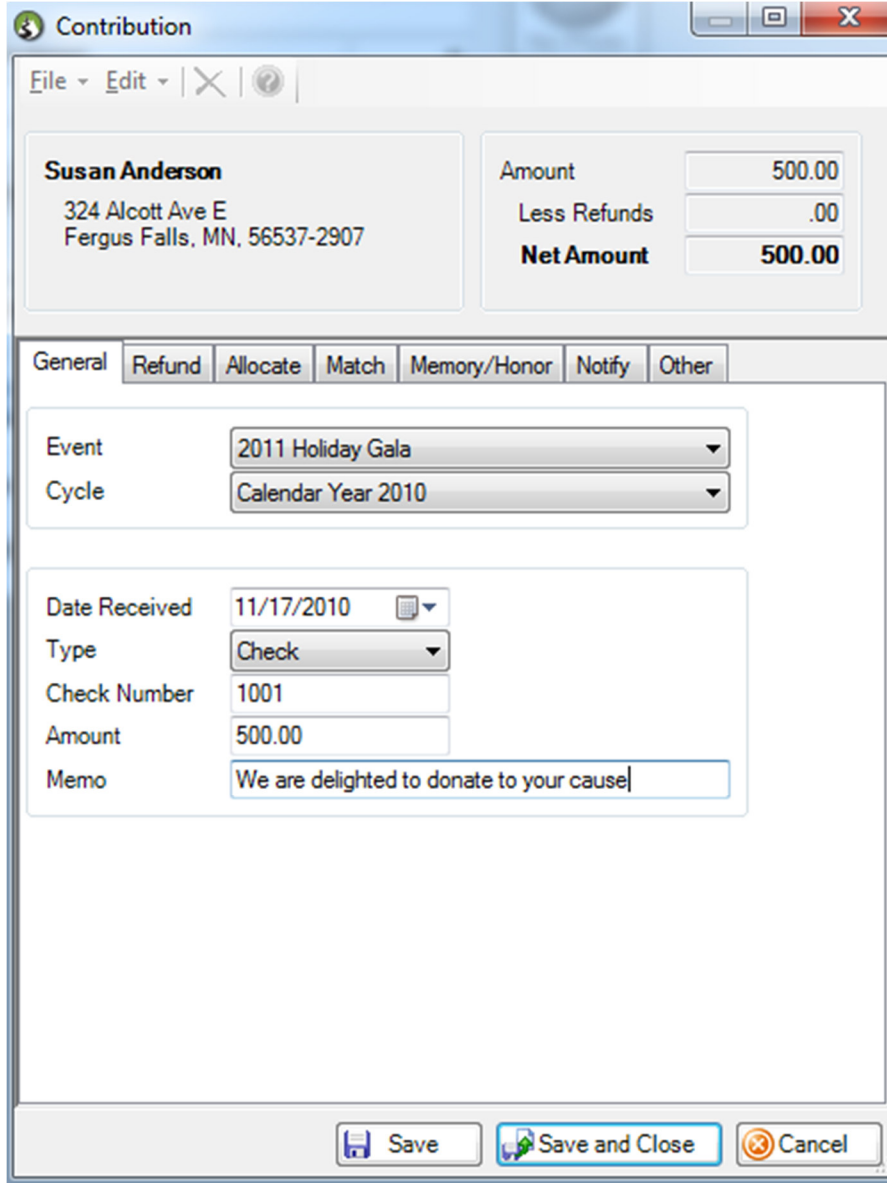
Screen parts diagram:



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.



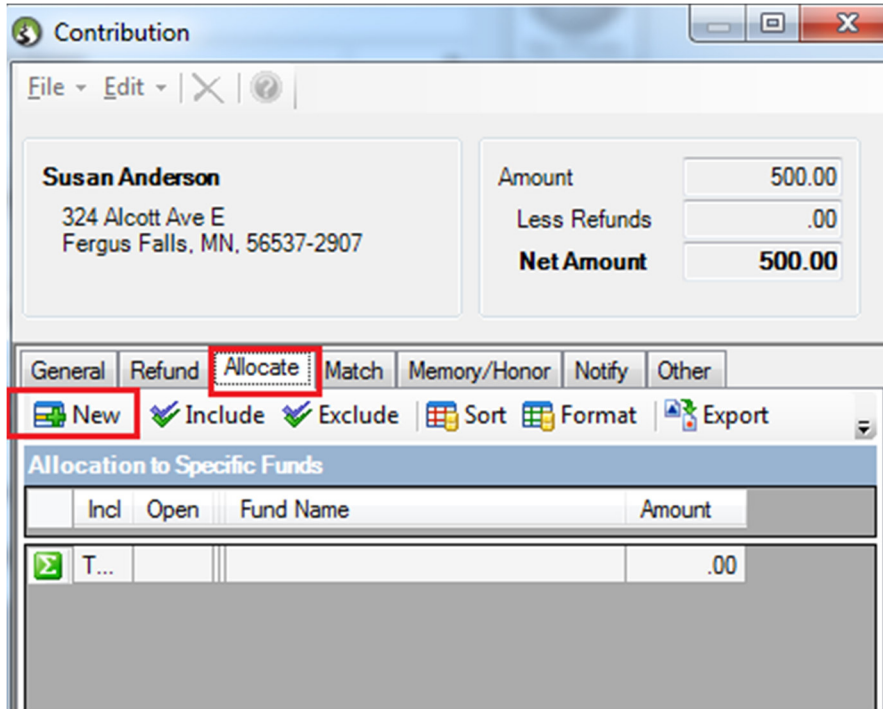
The screenshot shows a software window titled "Contribution" with a menu bar (File, Edit) and a toolbar. The main area is divided into two sections. The top section contains donor information for Susan Anderson (324 Alcott Ave E, Fergus Falls, MN, 56537-2907) and a summary table:

Amount	500.00
Less Refunds	.00
Net Amount	500.00

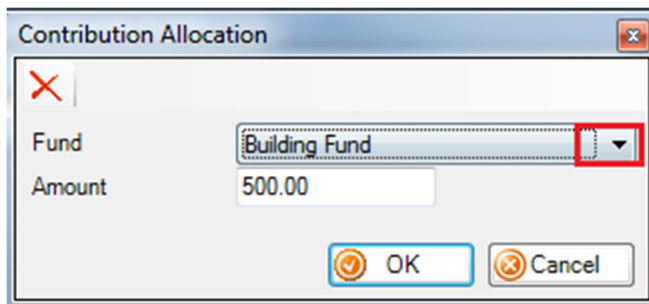
The bottom section is the "General" tab, which includes dropdown menus for "Event" (2011 Holiday Gala) and "Cycle" (Calendar Year 2010). Below these are input fields for "Date Received" (11/17/2010), "Type" (Check), "Check Number" (1001), "Amount" (500.00), and a "Memo" field containing the text "We are delighted to donate to your cause". At the bottom of the window are three buttons: "Save", "Save and Close", and "Cancel".

Restricting the Contribution to a Specific Fund

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



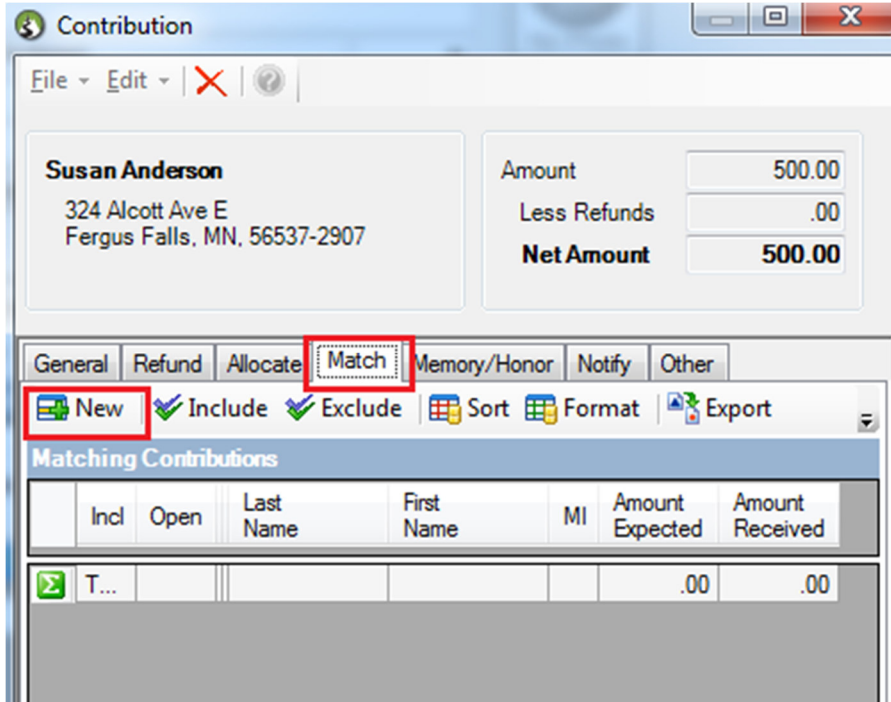
Enter the name of the fund¹ from the drop down menu to which you want to restrict the funds. Enter the amount if it is different from the full contribution amount. Click the **OK** button.



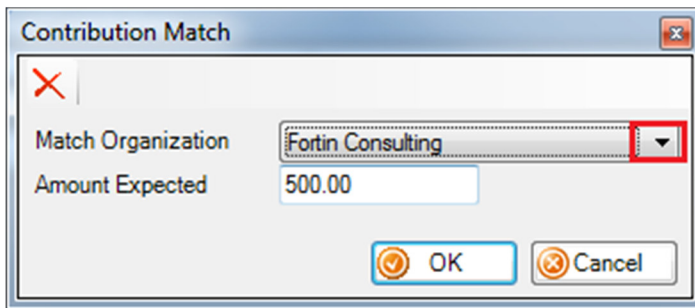
¹ See Appendix A for information to add new funds.

Enter Employer Matching

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



Enter the name of the Matching Organization² 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.



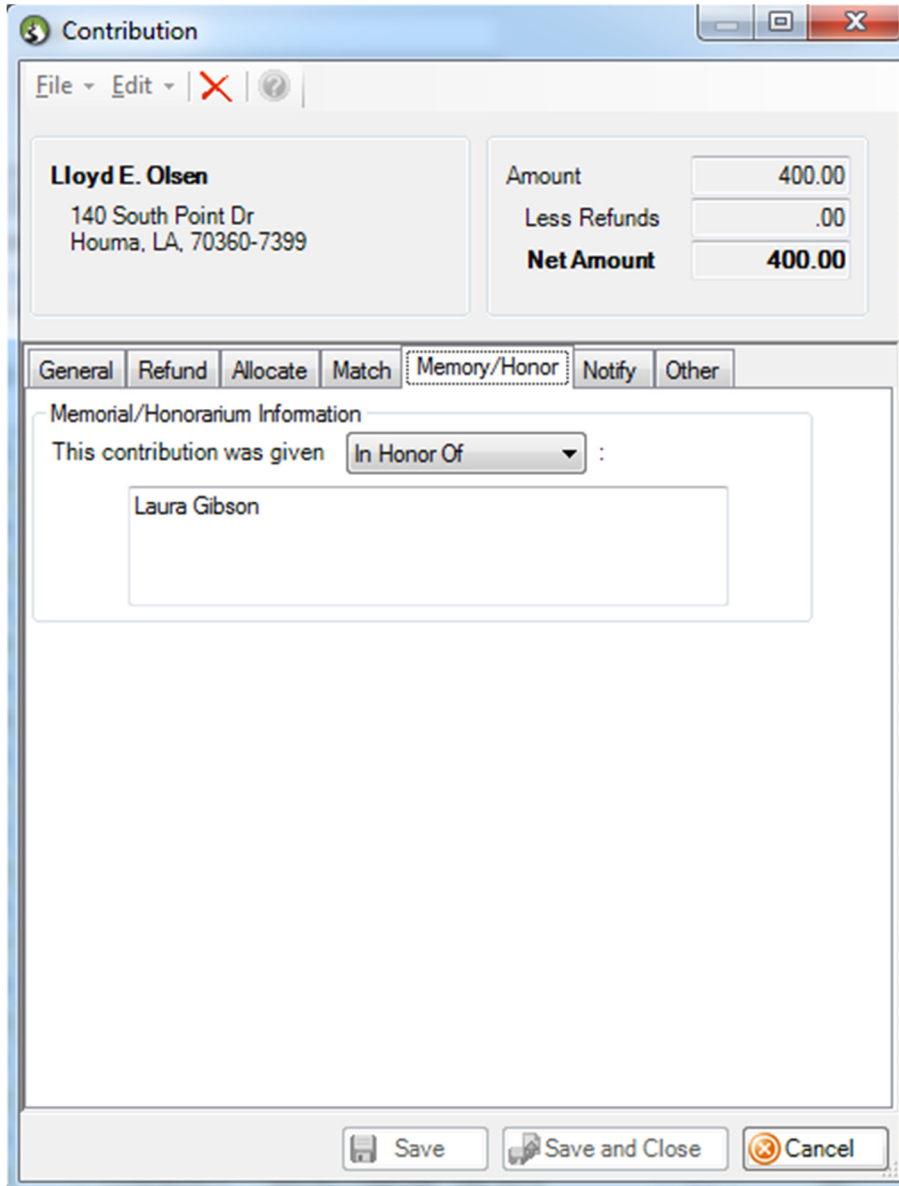
² See Appendix B for information on how to configure a donor to accept matching donation request.

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**.



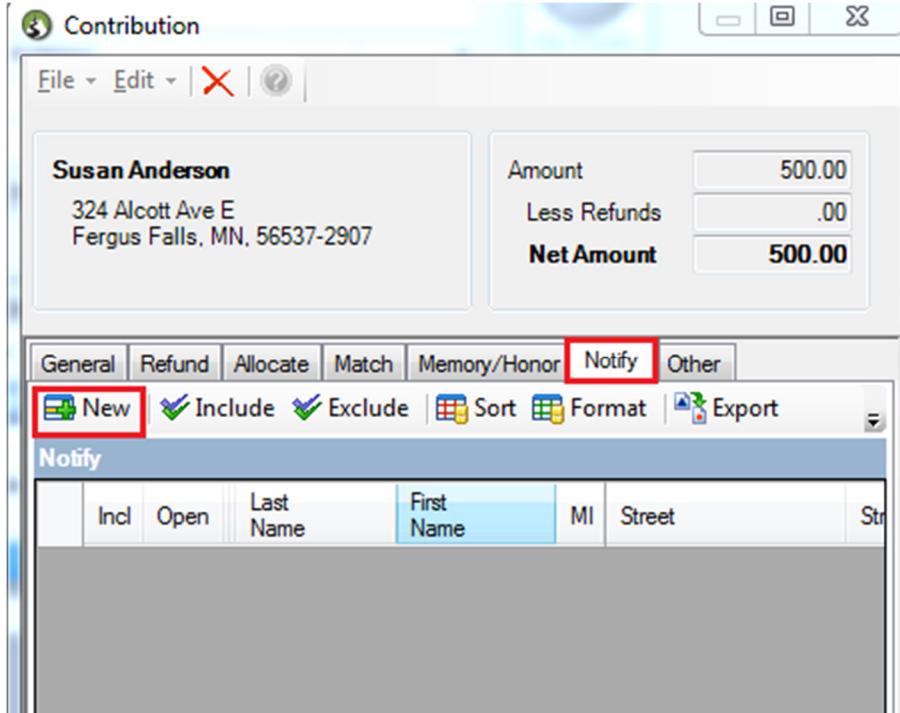
The screenshot shows a software window titled "Contribution" with a menu bar (File, Edit) and a toolbar. The donor information is as follows:

Lloyd E. Olsen 140 South Point Dr Houma, LA, 70360-7399	Amount: 400.00
	Less Refunds: .00
	Net Amount: 400.00

The "Memory/Honor" tab is selected, showing "Memorial/Honorarium Information". The dropdown menu is set to "In Honor Of" and the text field contains "Laura Gibson". At the bottom are "Save", "Save and Close", and "Cancel" buttons.

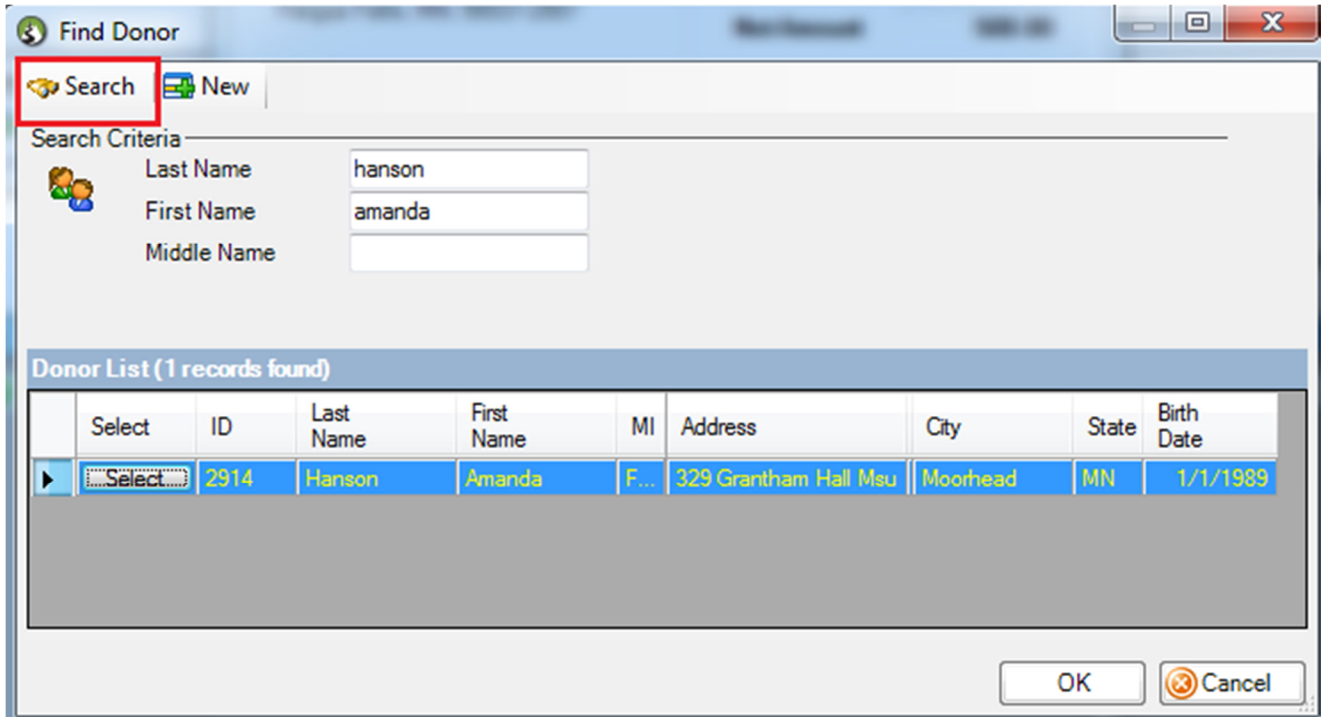
Enter Additional Notifications of the Contribution (thank you's typically)

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.



Find Donor

Search New

Search Criteria

Last Name: hanson

First Name: amanda

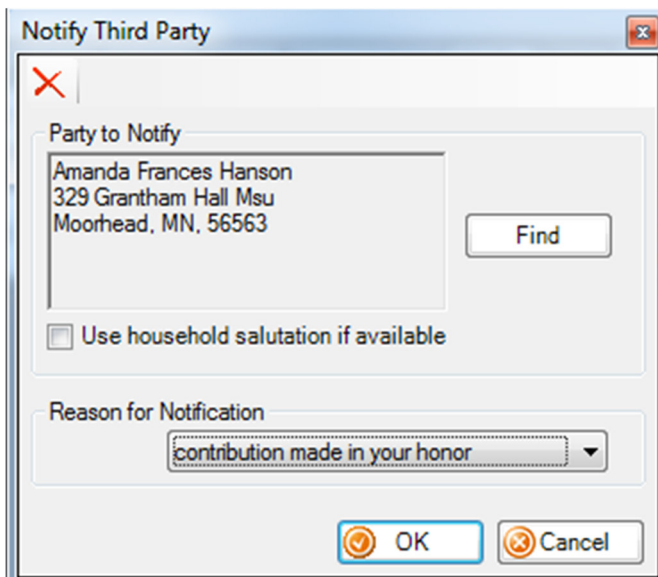
Middle Name:

Donor List (1 records found)

Select	ID	Last Name	First Name	MI	Address	City	State	Birth Date
Select	2914	Hanson	Amanda	F...	329 Grantham Hall Msu	Moorhead	MN	1/1/1989

OK Cancel

Once found, click the **Select** button.



Notify Third Party

Party to Notify

Amanda Frances Hanson
329 Grantham Hall Msu
Moorhead, MN, 56563

Find

Use household salutation if available

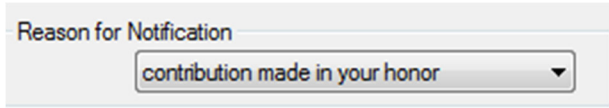
Reason for Notification

contribution made in your honor

OK Cancel

Use household salutation if available

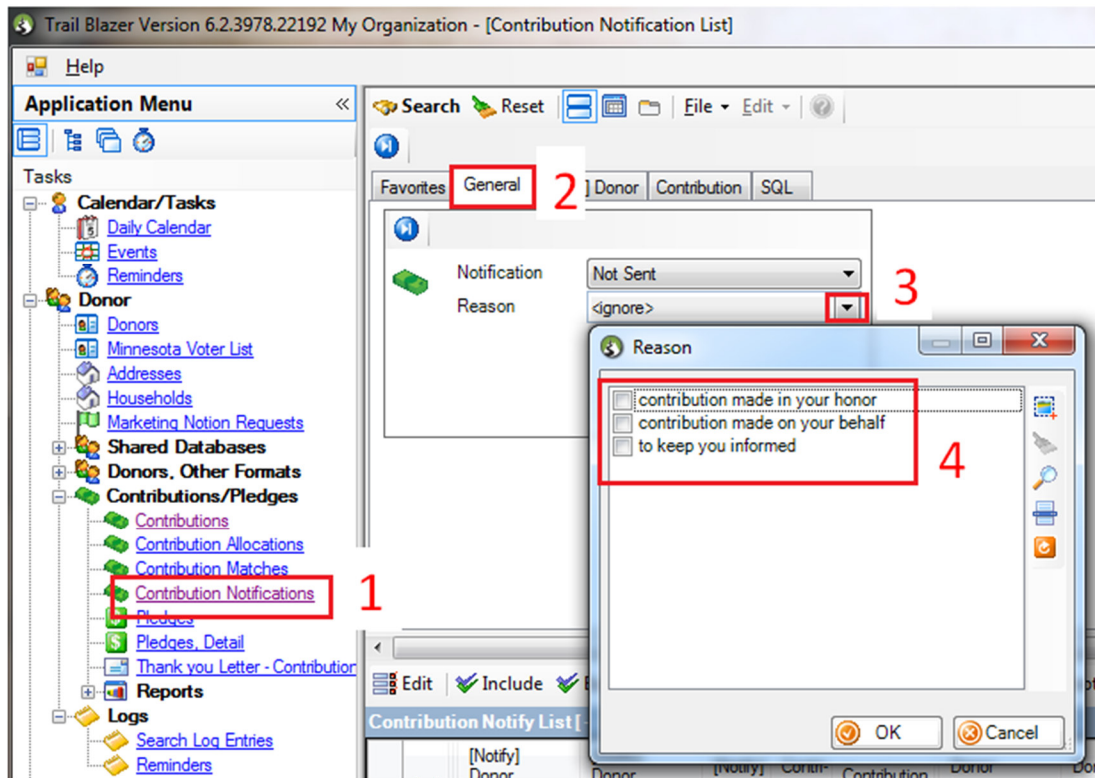
Check this box if you want to address the notification to all members of the household. This is specifically related to the merge letter and the merge fields.



This will assist you in determining what type of letter you are sending. The choices as they exist as of this writing are:

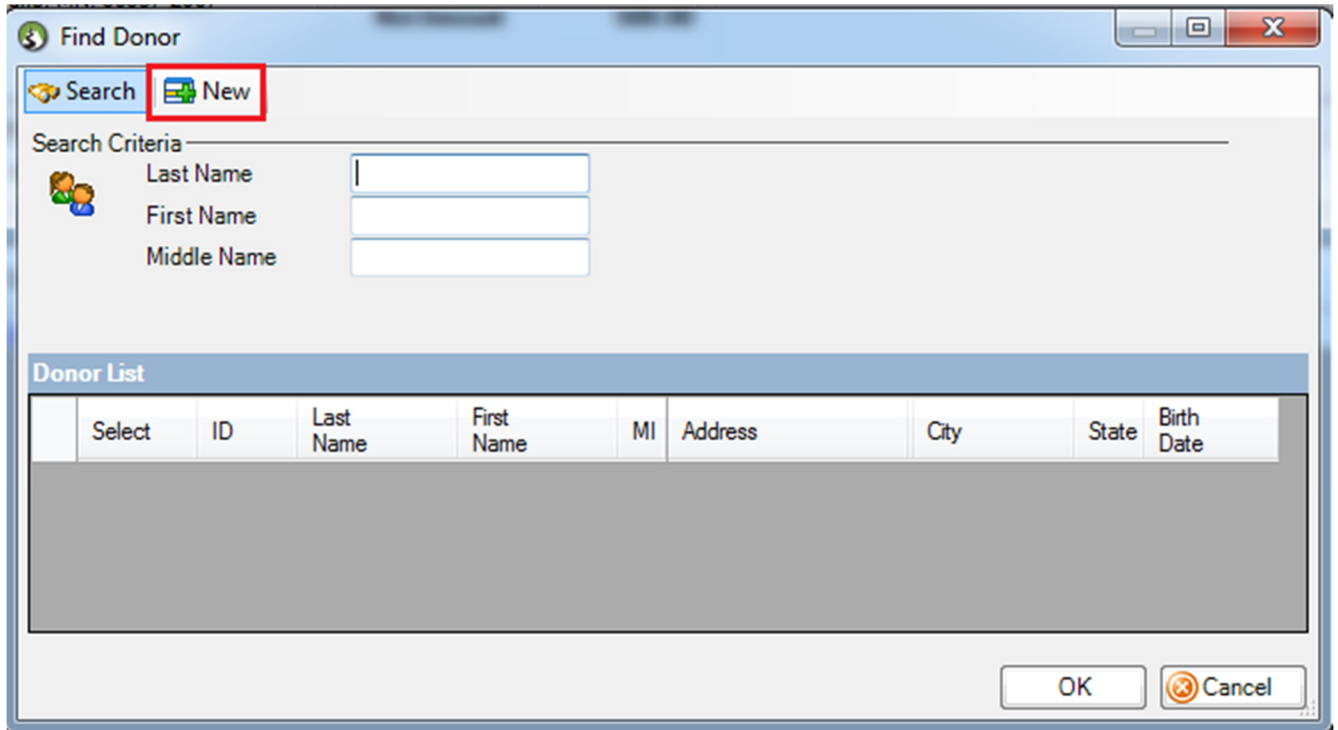
- contribution made in your honor
- contribution made on your behalf
- to keep you informed

These options are referenced in the **Contribution Notifications** search panel:

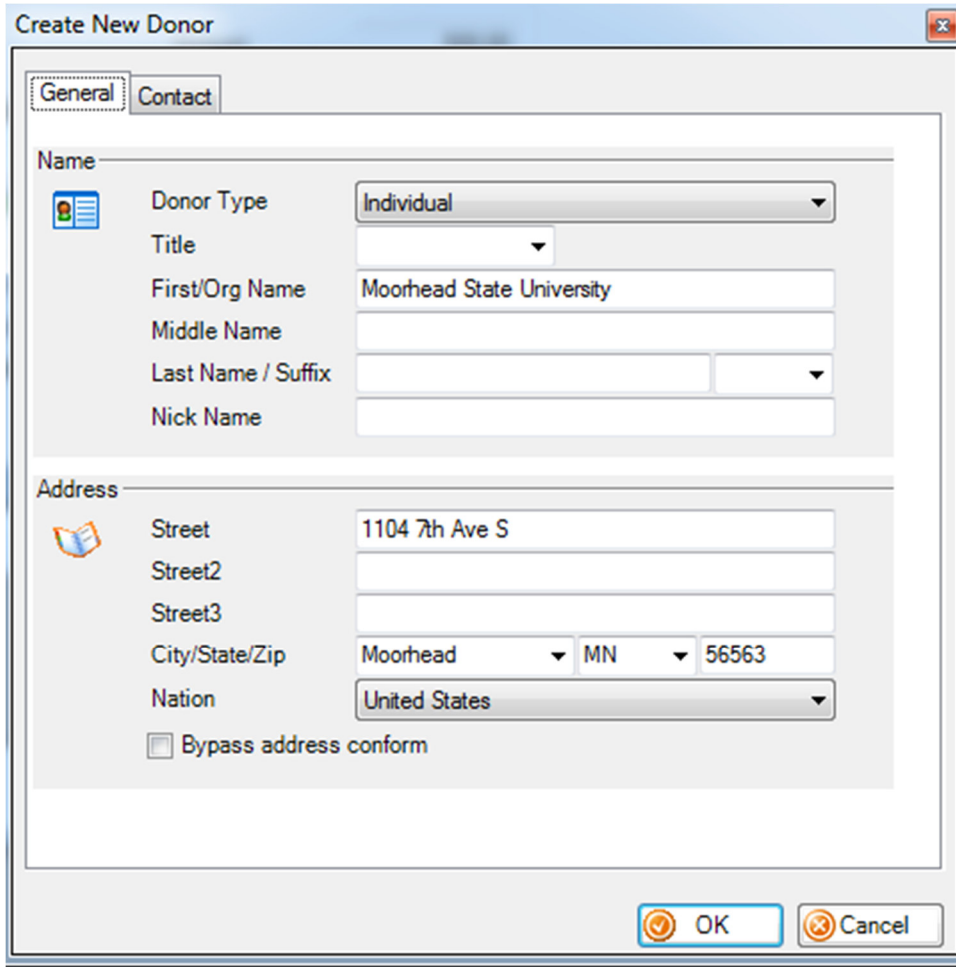


If the person/org DOES NOT exist in the database:

Click the **New** button.



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

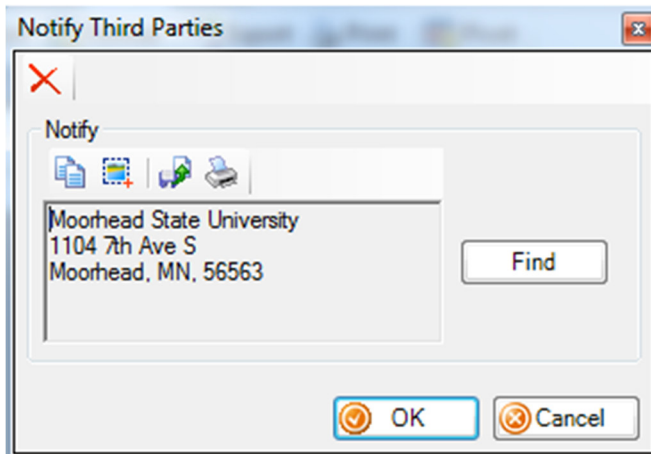


The "Create New Donor" dialog box has two tabs: "General" and "Contact". The "General" tab is active. It contains the following fields:

- Name:**
 - Donor Type: Individual (dropdown)
 - Title: (dropdown)
 - First/Org Name: Moorhead State University
 - Middle Name: (text box)
 - Last Name / Suffix: (text box)
 - Nick Name: (text box)
- Address:**
 - Street: 1104 7th Ave S
 - Street2: (text box)
 - Street3: (text box)
 - City/State/Zip: Moorhead MN 56563
 - Nation: United States (dropdown)
 - Bypass address conform

Buttons: OK, Cancel

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



The "Notify Third Parties" dialog box has a close button (X) in the top left corner. It contains the following elements:

- Notify:** A section with icons for document, calendar, mail, and printer.
- Text Area:** Moorhead State University
1104 7th Ave S
Moorhead, MN, 56563
- Find:** A button to search for the donor.
- Buttons:** OK, Cancel

The results in this example look like this:

Contribution

Susan Anderson
324 Alcott Ave E
Fergus Falls, MN, 56537-2907

Amount	500.00
Less Refunds	.00
Net Amount	500.00

General

Refund

Allocate

Match

Memory/Honor

Notify

Other

New

Include

Exclude

Sort

Format

Export

Print

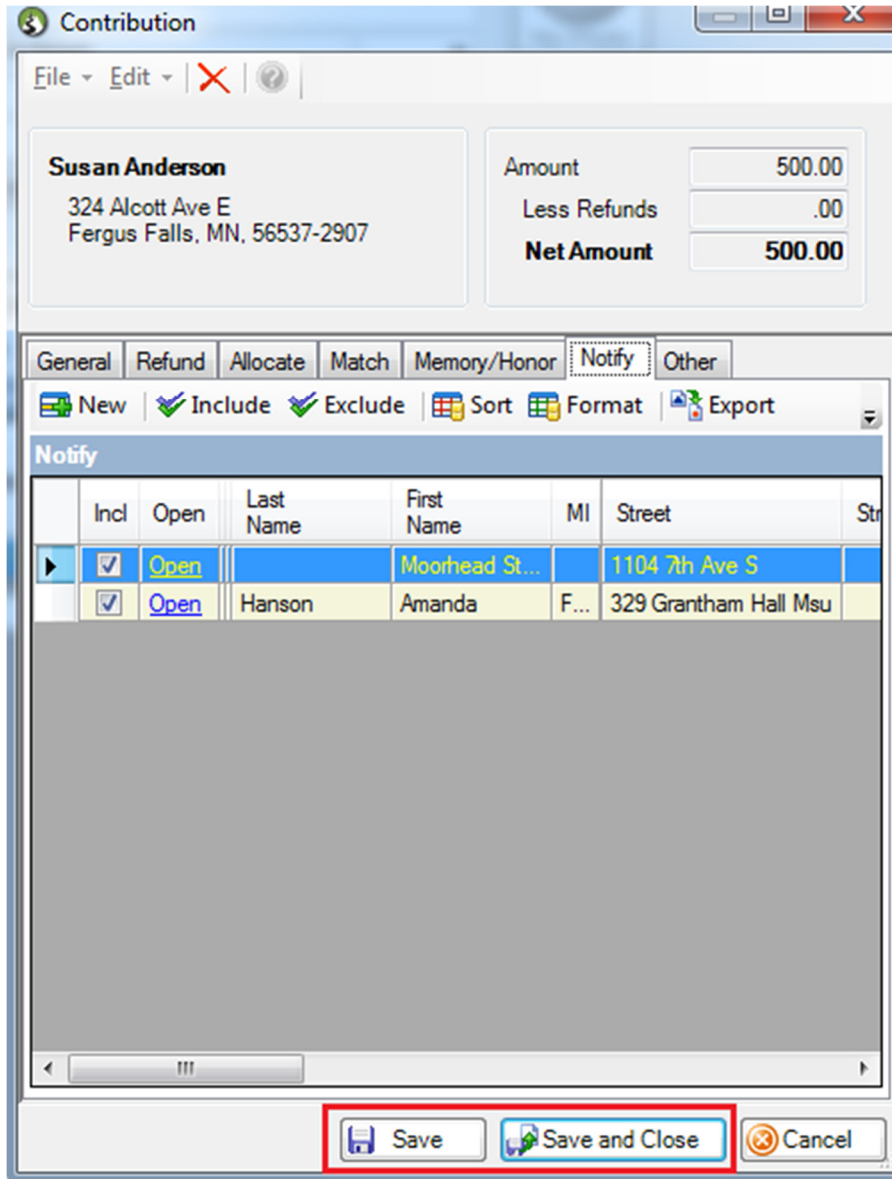
Pivot

Notify

	Incl	Open	Last Name	First Name	MI	Street	Street 2	City	State	Zip Code
▶	<input checked="" type="checkbox"/>	Open	Hanson	Amanda	F...	329 Grantham Hall Msu		Moorhead	MN	56563
	<input checked="" type="checkbox"/>	Open		Moorhead St...		1104 7th Ave S		Moorhead	MN	56563

(Reminder) - Save Periodically

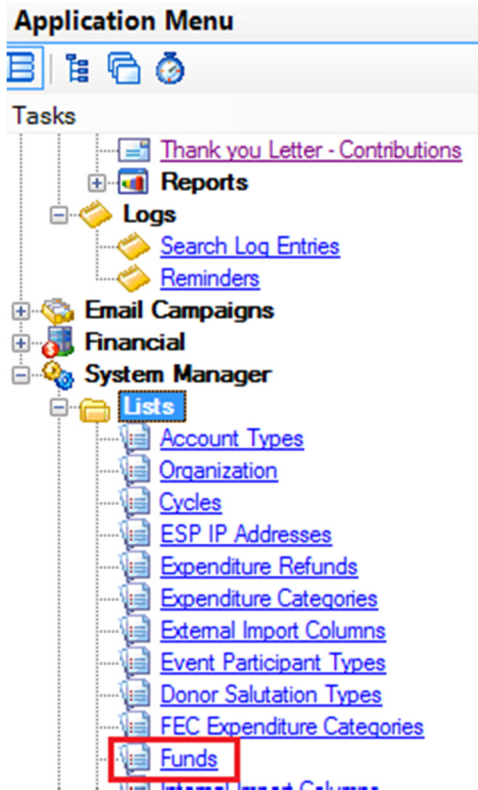
Be sure to SAVE your work as needed.



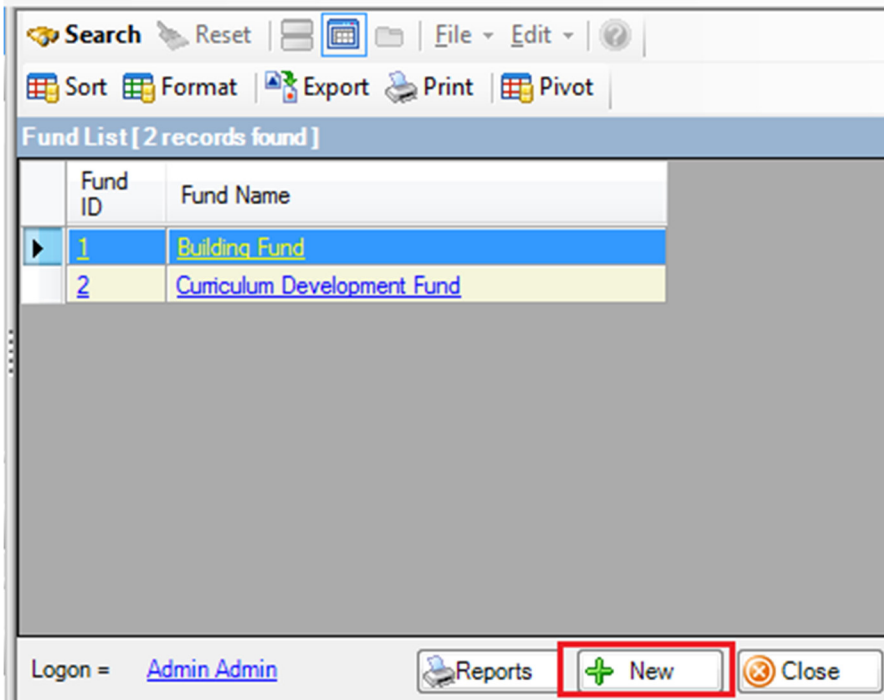
Appendix A

Setting Up a Fund – Create a New Fund Item

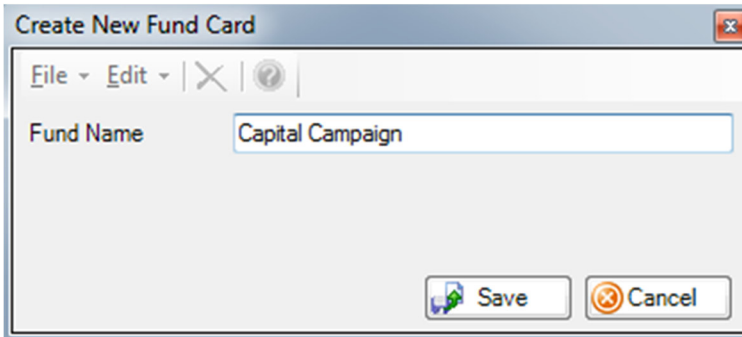
Select **Funds** from the **Lists** menu in **System Manager**.



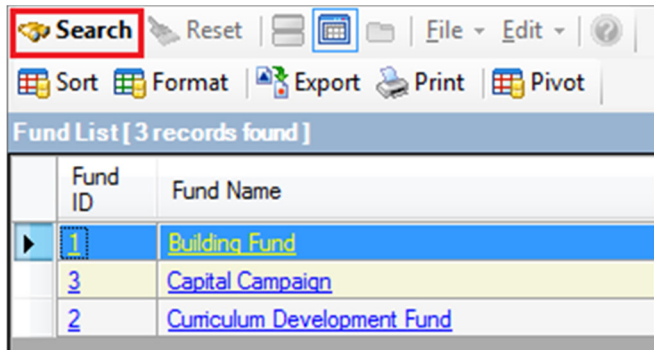
Click the **New** button.



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



Click **Search** to refresh the list.



The screenshot shows a software interface with a toolbar and a table. The toolbar includes buttons for Search (highlighted with a red box), Reset, File, Edit, Sort, Format, Export, Print, and Pivot. Below the toolbar is a header for the table: "Fund List [3 records found]". The table has two columns: "Fund ID" and "Fund Name".

Fund ID	Fund Name
1	Building Fund
3	Capital Campaign
2	Curriculum Development Fund

Appendix B

Identifying Matching Organizations

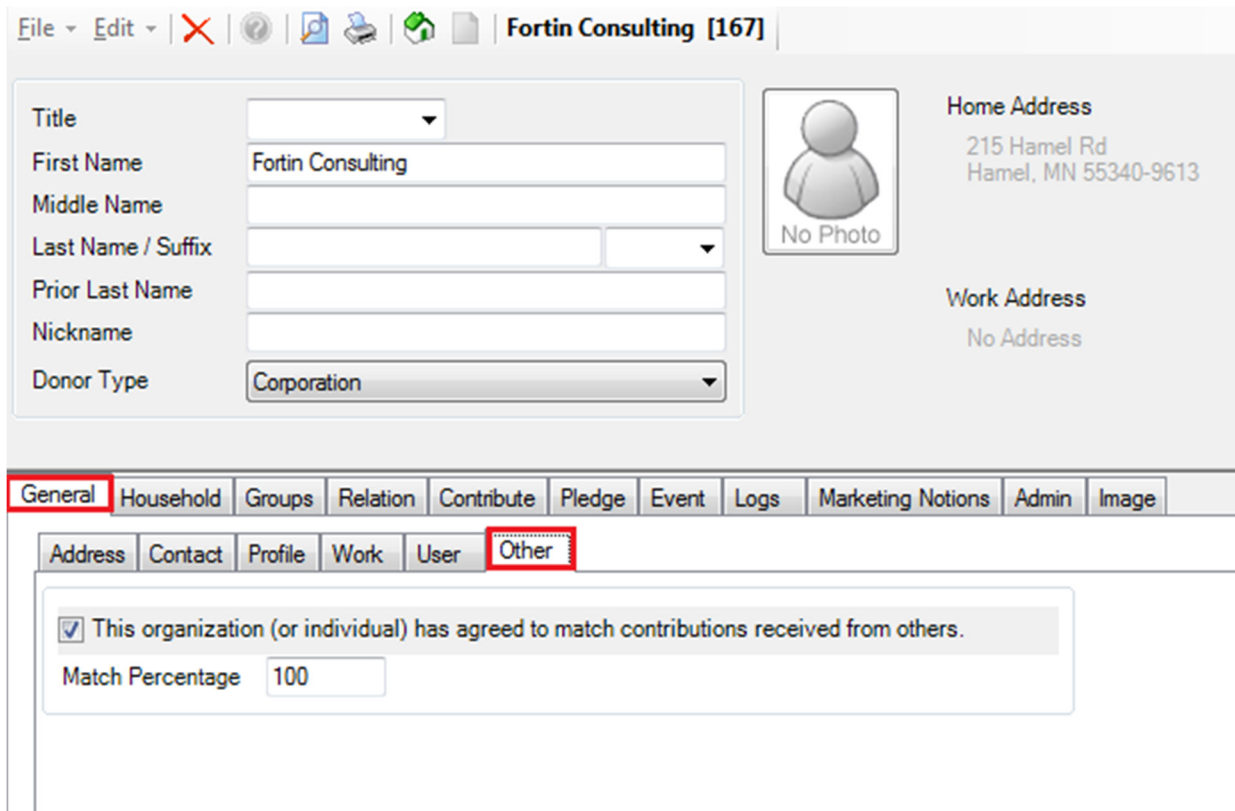
Open the donor organization record.

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**.



The screenshot shows the TrailBlazer interface for editing a donor organization record. The browser title is "Fortin Consulting [167]". The form is divided into several sections:

- General Information:** Fields for Title, First Name (Fortin Consulting), Middle Name, Last Name / Suffix, Prior Last Name, Nickname, and Donor Type (Corporation).
- Home Address:** 215 Hamel Rd, Hamel, MN 55340-9613.
- Work Address:** No Address.
- Navigation Tabs:** General (highlighted), Household, Groups, Relation, Contribute, Pledge, Event, Logs, Marketing Notions, Admin, Image.
- Sub-Tabs:** Address, Contact, Profile, Work, User, Other (highlighted).
- Matching Options:** A checked checkbox "This organization (or individual) has agreed to match contributions received from others." and a "Match Percentage" field set to 100.