1.09 Donations

- Donations Overview
- Adding Donations
- Receiving Donations

Donations Overview

Donations within Maestro allow you track monetary donations made to your organization. The donations section is better suited to handle campaigns such as an annual giving campaign, capital campaign, or other specific campaigns.

Sponsorships for events are best tracked using Involvements rather than the donations section.

The first step in using donations is to complete the initial setup. This is done in the Organizational Settings, which are accessed through the hammer & wrench icon on the left hand navigation.

Appeals

Adding appeals lets you track how you are asking for funds. Common appeals are in-person, direct mail, internet, etc.

Campaigns

Campaigns are the overall fundraising efforts your organization is undertaking, such as a capital campaign, annual fundraising drive, etc.

Funds

Funds are where you donations will go. This can be general operating, special funds, or any other location that you want to track.

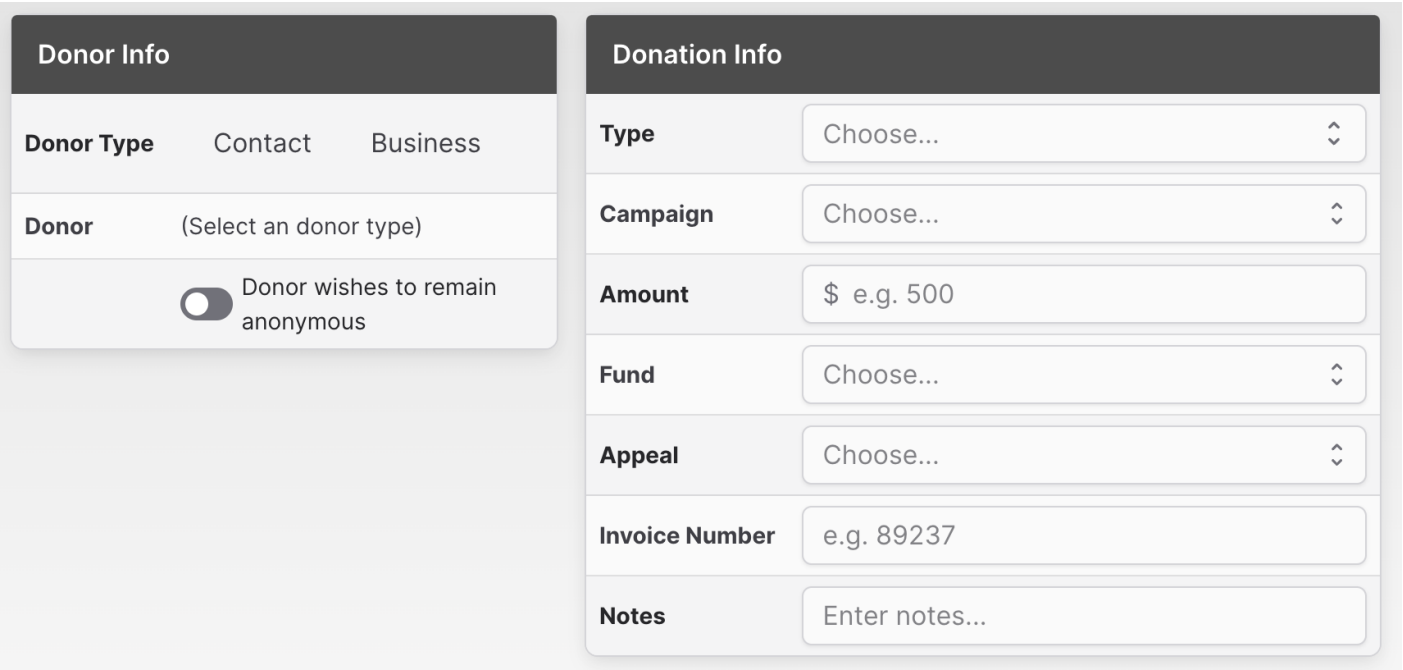
Once your initial setup is complete, you are ready to add donations to your Maestro System.

Adding Donations

Once your initial setup is complete, you are ready for entering donation information.

To get started with this, click the donations icon on the left navigation.

To add a donation click on the "+" button in the upper right hand corner. This will open the donation edit screen.



Select whether the donation is coming from a Contact or a Business and the list of contacts or businesses in your system will be available for you to scroll or type the person/business name.

If this donor chooses to remain anonymous you can toggle the switch to the on position. If this is on, only Admins will be able to see the giver.

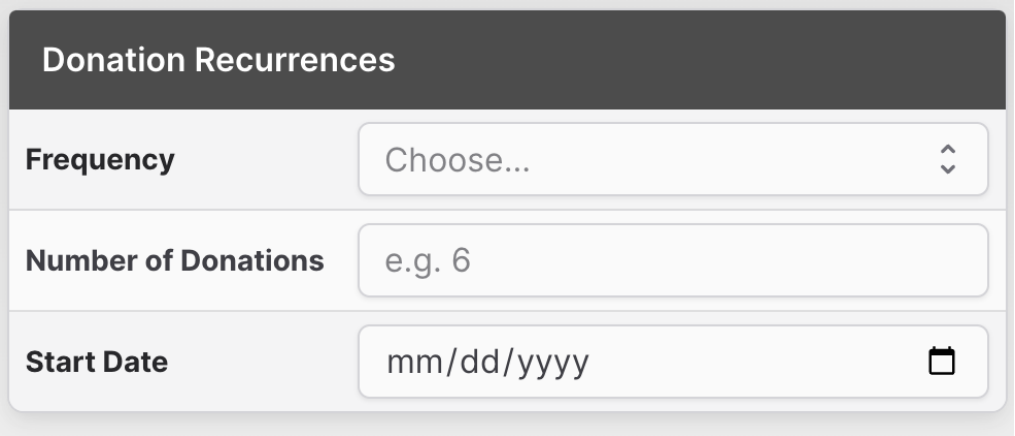
In the donation Info section, you will select the type. There are three types to pick from:

- Single
  - One-time gifts
- Recurring
  - Gifts that will be paid in installments
- In Kind
  - Donated goods or services

You will also Select the campaign, fund, and appeal in the donation info section.

You will enter the amount and if there is an invoice number for this you can also include that information. You can also add a note to the donation.

If you selected a recurring donation, you will have a new section that appears in the right hand column.

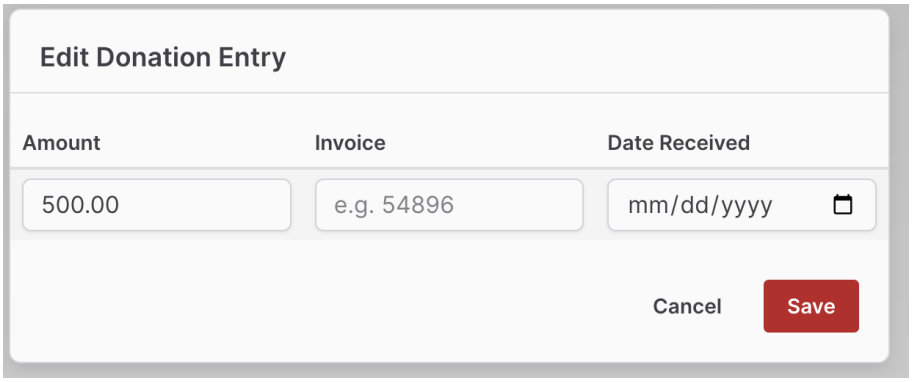


Here you can choose the frequency (quarterly, monthly, or yearly), and the number of times this will occur. It is important to note that the donation amount in the Donation Info will be what is expected and entered into your reporting. A $1,000 donation paid over 10 months would be entered as a $100 donation that recurs 10 times, and not a $1,000 donation recurring - which would result in a $10,000 donation.

Receiving Donations

Once you have created a donation, it is not automatically considered to be received by the organization.

When a donation has been created, you can then click the checkbox in the Received section, which will open a pop-up.



Now you can enter the amount received, any invoice number, and the date.

This will now appear in your reporting as a received donation.