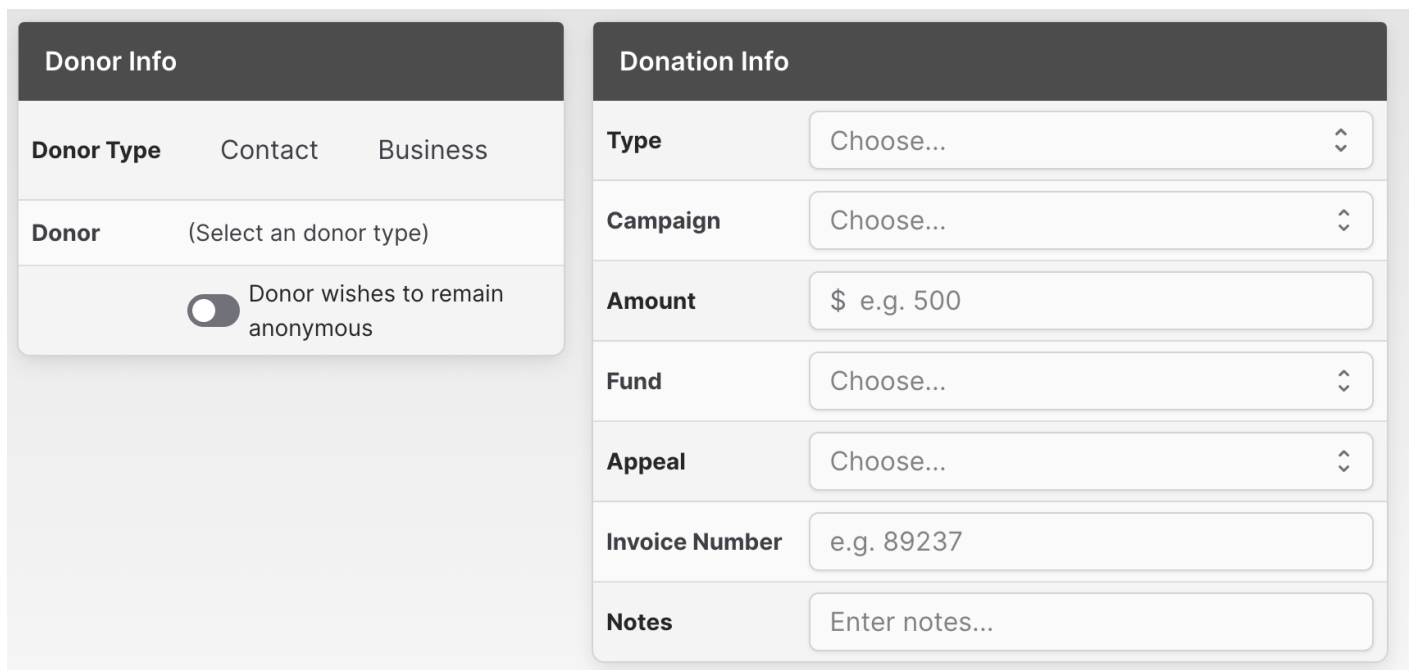


Adding Donations

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.



The screenshot displays the donation edit interface, divided into two main sections: Donor Info and Donation Info.

Donor Info

- Donor Type:** Includes tabs for "Contact" and "Business".
- Donor:** A dropdown menu labeled "(Select an donor type)".
- Donor wishes to remain anonymous:** A toggle switch currently in the "off" position.

Donation Info

- Type:** A dropdown menu with "Choose..." and an up/down arrow.
- Campaign:** A dropdown menu with "Choose..." and an up/down arrow.
- Amount:** A text input field with a dollar sign icon and the placeholder "e.g. 500".
- Fund:** A dropdown menu with "Choose..." and an up/down arrow.
- Appeal:** A dropdown menu with "Choose..." and an up/down arrow.
- Invoice Number:** A text input field with the placeholder "e.g. 89237".
- Notes:** A text input field with the placeholder "Enter notes...".

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.

Donation Recurrences

Frequency

Choose...

Number of Donations

e.g. 6

Start Date

mm/dd/yyyy

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.