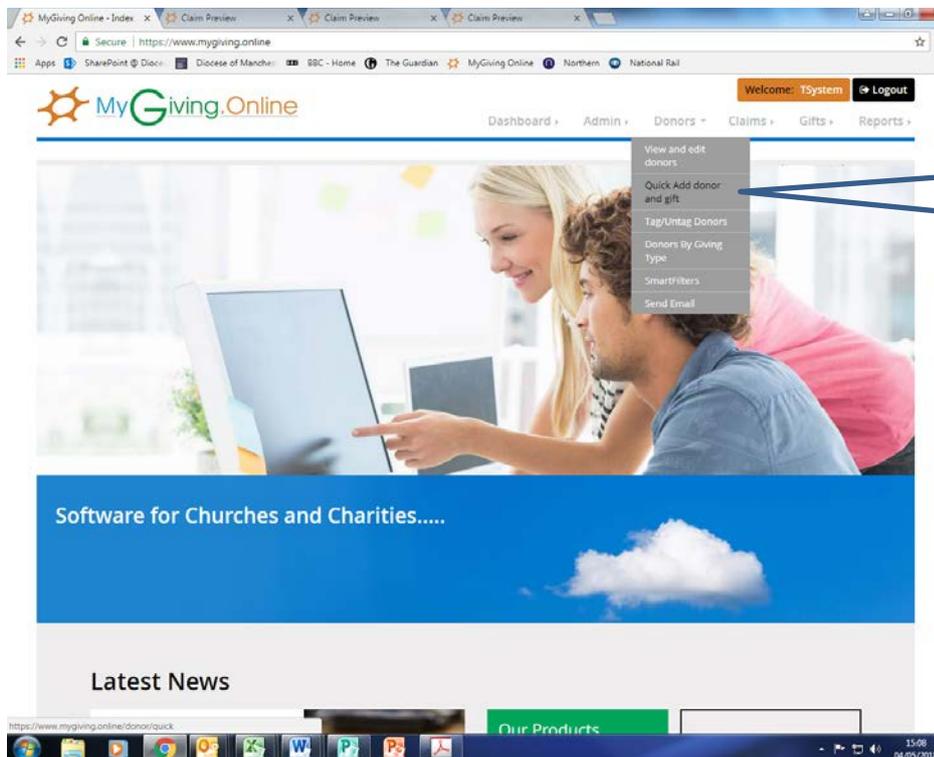


## GAL6 - Using Quick Add donor and gift

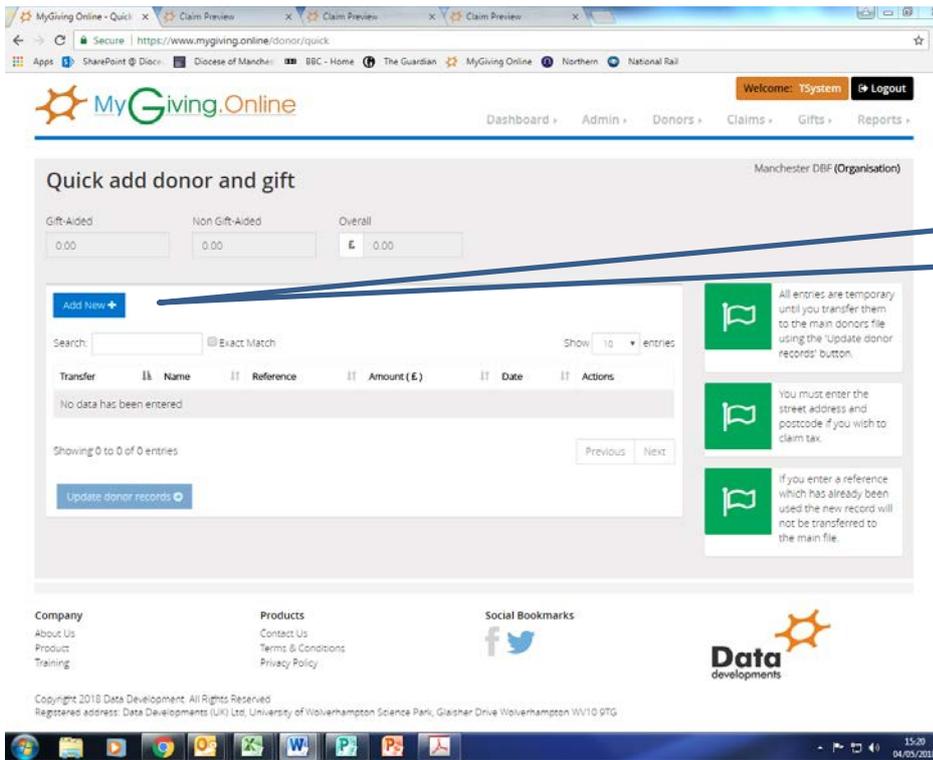
Quick Add donor and gift should be used when you have received donations from one-off attendees at your Church, and the donations could be Gift Aided or not. Quick Add must be used for donations of over £20 per person (even if you are not going to see them again), for donations received of £20 or less you should enter these as an aggregate donation and still claim Gift Aid on them. This process has been created to save you time entering the donations, whilst also complying with Gift Aid regulations.

Please note the following points before using this data entry method:

- If you are entering donation details for a donor record which already exists on the system it will not be transferred to it.
- The street address and postcode must be entered if you wish to claim tax.
- Step 1

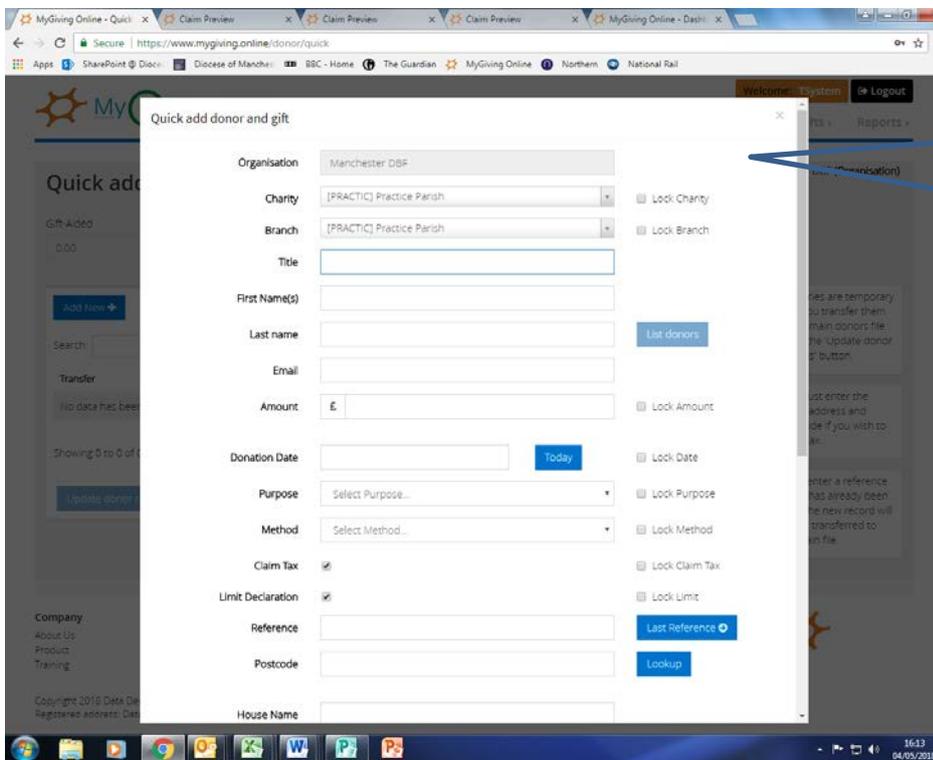


- Step 2



Click on Add New to enter your donations.

- Step 3



This pop up window will open. Please see below for details on how to complete this.

Quick add donor and gift

Organisation: Manchester DBF

Charity: [PRACTIC] Practice Parish  Lock Charity

Branch: [PRACTIC] Practice Parish  Lock Branch

Title:

First Name(s):

Last name:

Email:

Amount: £   Lock Amount

Donation Date:    Lock Date

Purpose: Select Purpose...  Lock Purpose

Method: Select Method...  Lock Method

Claim Tax:   Lock Claim Tax

Limit Declaration:   Lock Limit

Reference:

Postcode:

House Name:

This is the top of the screen you will see. You'll need to scroll down to see the rest of the fields you'll need to complete.

Claim Tax:   Lock Claim Tax

Limit Declaration:   Lock Limit

Reference:

Postcode:

House Name:

House Number:

Street Name:

Donor Type: Weekly  Lock Donor Type

Batch Reference: QA-180504  Lock Batch

Comment:   Lock Comment

Password

Username:

Password:

Confirm Password:

Password Question:

Password Answer:

This is the lower half of the screen you need to complete.

- Step 4

Type in the Title, First Name(s), Last Name, and Email for the donor.

Click on List donors to check whether the donor is already entered on your system. If so, do not proceed and add the donation to the existing record.

Enter the donation amount and the date of the donation. If you tick the box to Lock Date, this will keep the same date for all the entries in your batch of donations.

A unique reference number will be needed for each donor. To do this Click on Last Reference to do this, and the box as shown below will appear.

It shows the last reference numbers you have used for a donor record, or within the Quick Add process. You can write the reference number down and type it in or click Copy, then OK. You'll be returned to the previous screen, click in the Reference box, right click and past the number into it. Don't forget to add the next sequential number (e.g. 41).

If you are adding more than one donor and gift using Quick Add, please ensure you click on this Copy and add the next sequential number.

The screenshot shows a web form for entering a donation. The form is divided into several sections:

- Top Section:** Includes checkboxes for 'Claim Tax' (checked), 'Limit Declaration' (checked), 'Lock Claim Tax' (checked), and 'Lock Limit' (checked). There are 'Last Reference' and 'Lookup' buttons.
- Address Section:** Fields for 'Reference' (pract0000034), 'Postcode' (M3 2GH), 'House Name' (Diocesan Board Of Finance, Church House), 'House Number' (90), and 'Street Name' (Deansgate).
- Donation Details Section:** A 'Donor Type' dropdown menu (set to 'One Off Gift'), 'Batch Reference' (QA-180504), and a 'Comment' field (Bell ringing visitors). There are checkboxes for 'Lock Donor Type', 'Lock Batch', and 'Lock Comment'.
- Authentication Section:** Fields for 'Username', 'Password', 'Confirm Password', 'Password Question', and 'Password Answer'.
- Bottom Section:** 'Cancel' and 'Save' buttons.

Callout boxes provide instructions for the 'Lookup' button, 'Donor Type' dropdown, 'Batch Reference' field, 'Comment' field, and the 'Save' button.

As you scroll down the screen, you'll be able to enter the donor's address details.

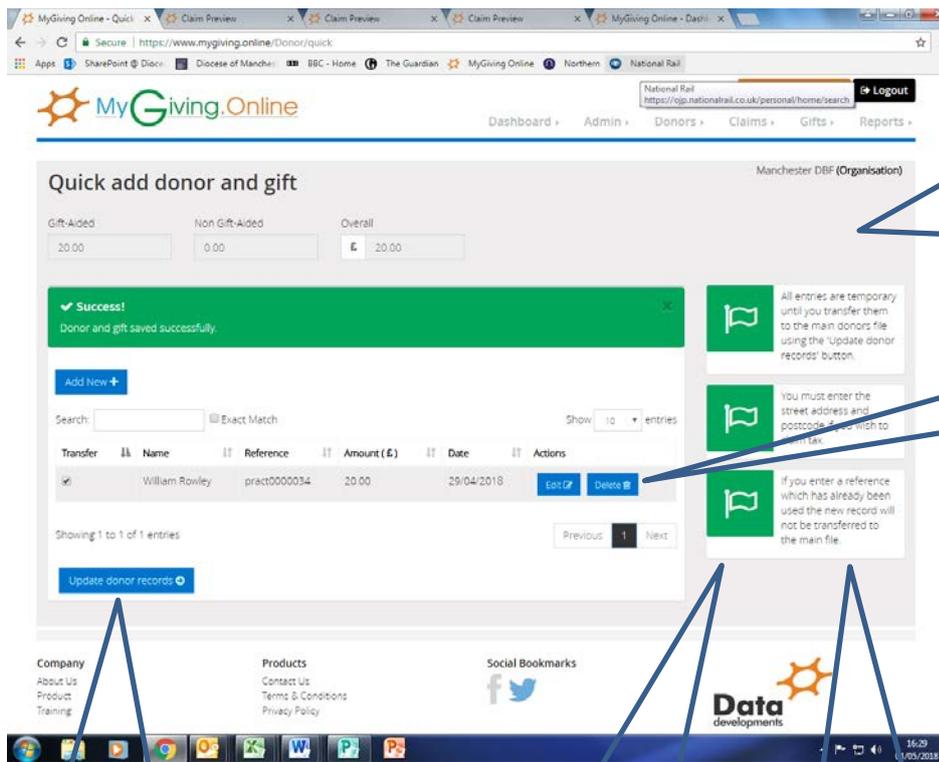
Choose the appropriate Donor Type from the drop down list and you can click on Lock Donor Type if you'd like to use it for a number of donations.

A Comment option is also available where you can enter the reason for the donation. This can also be locked if you'd like to use it

Click on Save to store your entry.

If required, enter a Batch Reference and you can click on Lock Batch if you'd like to use it for a number of donations.

- Step 5



Once you have saved it, this window will appear with a notification you've been successful.

It can be edited or deleted at this stage if you wish.

Please note the donations will not be transferred to the relevant donor records until you have clicked on Update Donor Records.

Ensure you have entered the donor's home address and postcode if you are claiming Gift Aid.

If you have used the reference number for a previous donor record, the donations will not be transferred until a unique reference number has been created. They will be held in 'limbo' on this screen.