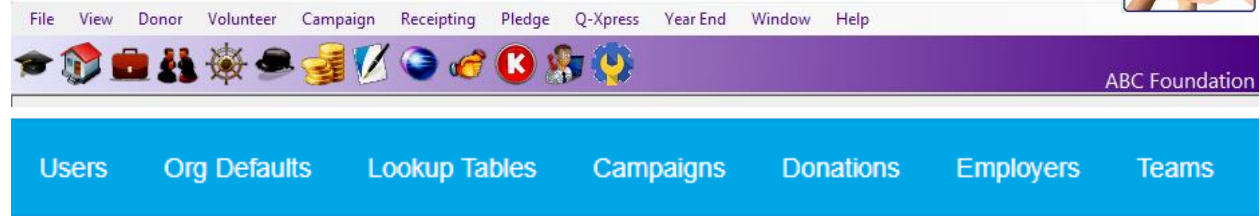


# Donate Now and RFWE



## Manually Adding Donations



## Contents

Situation One .....	2
A Supporter Donated through the Donate Now portal and would like it attributed to a specific Team and or Team and Team Member. ....	2
Situation Two .....	4
A cheque is received by the charity or a team member and the donor would like it attributed accordingly. ....	4
Situation Three.....	6
Making Corrections to a Manually Entered Gift.....	6
A gift was wrongly allocated, gifted in error or has a mistake that needs fixing.....	6
Editing a manually entered Gift .....	6
Deleting a Manually Entered Gift.....	7
Making Corrections to a Donate Now Gift Allocated to a Team .....	8

# Donate Now and RFWE

## Manually Adding Donations



### Situation One

A Supporter Donated through the Donate Now portal and would like it attributed to a specific Team and or Team and Team Member.

Login into Donate Now and go to the Donations menu. Look for donations which have or have not been downloaded to find the donor who wants their gift allocated

Downloaded	Processed	Private First Name	Private Last Name	Company Name	Campaign	Payment Method	Receipt Date	Amount	Pledge Count	Pledge Interval	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sharron	Jones		Troops	VISA	2/11/2018	\$1.00			Link to Team
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Emily	Dunford		CycleDon	VISA	2/08/2018	\$1.00			Link to Team
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sharron	Batsch		CycleDon	VISA	2/08/2018	\$1.00			Link to Team

Return to Home Page

One the far right of the Listing look for Link to Team and Click on it.

Donations

Link to Team

Donor: Sharron Batsch  
Campaign: CycleDon  
Receipt Date: 2/08/2018  
Amount: \$1.00

Team:

Acquired by:

Save Cancel

The Link to Team window appears showing the Donor's name, the Campaign they gave to and the Amount.

Donations

Link to Team

Donor: Sharron Batsch  
Campaign: CycleDon  
Receipt Date: 2/08/2018  
Amount: \$1.00

Team:

Acquired by:

Save Cancel

Using the pulldown fields you can select the Team. Team members will appear in the Acquired by and the right team member can be selected who was responsible for

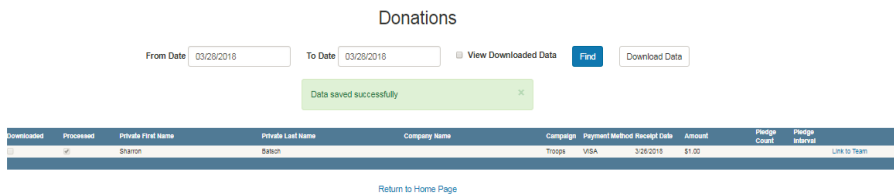
# Donate Now and RFWE

## Manually Adding Donations



the gift. If the gift is to the team only and not a particular individual, leave Acquired by blank.

Click SAVE to complete the entry.

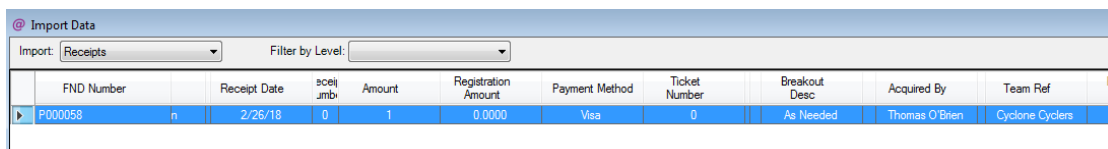


The update is validated.



The Team window, Honour Rolls displays the gift which was allocated through the Donations listing.

Upon importing the donation records into @EASE we can see the gift by donor number P000058 with the acquisition name of Thomas O'Brien in the screen below.



# Donate Now and RFEW

## Manually Adding Donations



### Situation Two

A cheque is received by the charity or a team member and the donor would like it attributed accordingly.

Login into Donate Now and click on the **Teams** menu.

Select the Team you wish to add the manual payment to and click Manual Payments.



Team Name	Team Captain	Team Admin	
Comedy Night	Comedy Night	Admin@ABCFoundation.com	Manual Payments
Cyclone Cyclers	Yogi Bear	register01@batschgroup.com	Manual Payments

### Cyclone Cyclers

#### Add/Edit Manual Payment

**Name:**

**Amount:**

**Donate To:**

Enter the name of the donor and the amount.

Use the pulldown to choose which team member to donate to.

If only the team is being supported and not a particular member, leave this field blank.

Click **SAVE**.

# Donate Now and RFEW

## Manually Adding Donations



### Cyclone Cyclers

	Name	Amount	Donate To
Edit Delete	Tom Bryson	\$50.00	Thomas O'Brien
Edit Delete	Lynn Fisher	\$50.00	Thomas O'Brien

Add Payment

The window displays all additional gifts including the one just added.

Note that you can Edit an entry or Delete it.

Further entries can be added at this time to this Team by clicking Add Payment.

# Donate Now and RFE



## Manually Adding Donations



### Situation Three

#### Making Corrections to a Manually Entered Gift

A gift was wrongly allocated, gifted in error or has a mistake that needs fixing.



#### Editing a manually entered Gift

Go to Teams and select the team where the error donation was entered.

Click on Manual Payments and a window of all manually entered gifts will appear.

### Cyclone Cyclers

	Name	Amount	Donate To
Edit Delete	Tom Bryson	\$50.00	Thomas O'Brien
Edit Delete	Lynn Fisher	\$50.00	Thomas O'Brien

Click Edit to modify the gift information or Delete to remove it.

### Cyclone Cyclers

#### Add/Edit Manual Payment

**Name:**

**Amount:**

**Donate To:**

In this example, we are correcting the spelling of the last name of the Donor.

Once Save is clicked the change will become evident.

Other edits might be where a gift is allocated to the wrong individual.

# Donate Now and RFEW



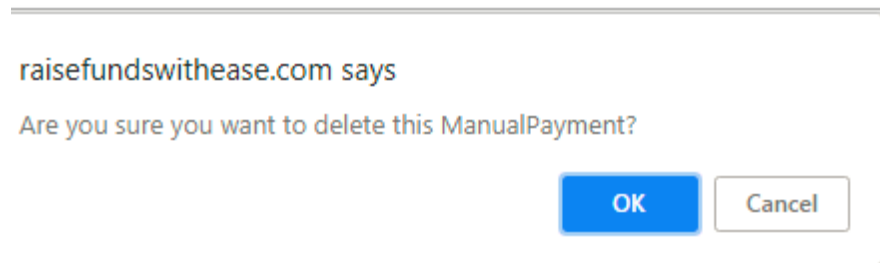
## Manually Adding Donations



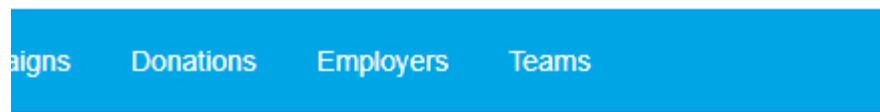
### Deleting a Manually Entered Gift

If the gift was entered in error either to the wrong team or simply incorrectly instead of Edit, click the Delete button.

A confirmation window will appear from above which enables you to confirm or cancel the action.



## tion



## Cyclone Cyclers

	Name	Amount	Donate To
Edit <a href="#">Delete</a>	Tom Bryson	\$50.00	Thomas O'Brien
Edit <a href="#">Delete</a>	Lynn Fischer	\$50.00	Thomas O'Brien

# Donate Now and RFWE



## Manually Adding Donations



## Making Corrections to a Donate Now Gift Allocated to a Team

Go to the Donations menu and select the gift entered in error.



In the case above the gift has not been downloaded. If the gift had been entered into @EASE, use the View Downloaded Data button to locate the entry.

The gift can be re-allocated to the correct person but once allocated the only option would be to re-allocate the gift to an Anonymous faux record where error entries go.

This would be the only way to correct a gift allocated incorrectly through this process so undue care must be taken when allocating a gift.

Donations imported with an incorrect Team entry would need to be modified through the @EASE. So once again, only trained individuals who work with care should be managing changes of this type.

Batsch Group Inc

April 2018