# GAL8 - Entering one off, regular and anonymous GASDS donations

This guide shows you how to enter new GASDS donations onto the system using the different options available to you. Please ensure you follow all of the steps outlined in this guide otherwise it will create errors you will need to rectify before authorising your quarterly claim.

The five options covered in this guide are:

1. Entering donations individually
2. Entering donations in a grid
3. Entering donations by name, envelope or reference
4. Entering a donation in view and edit donors
5. Entering anonymous donations

- Entering Donations Individually

- Step 1
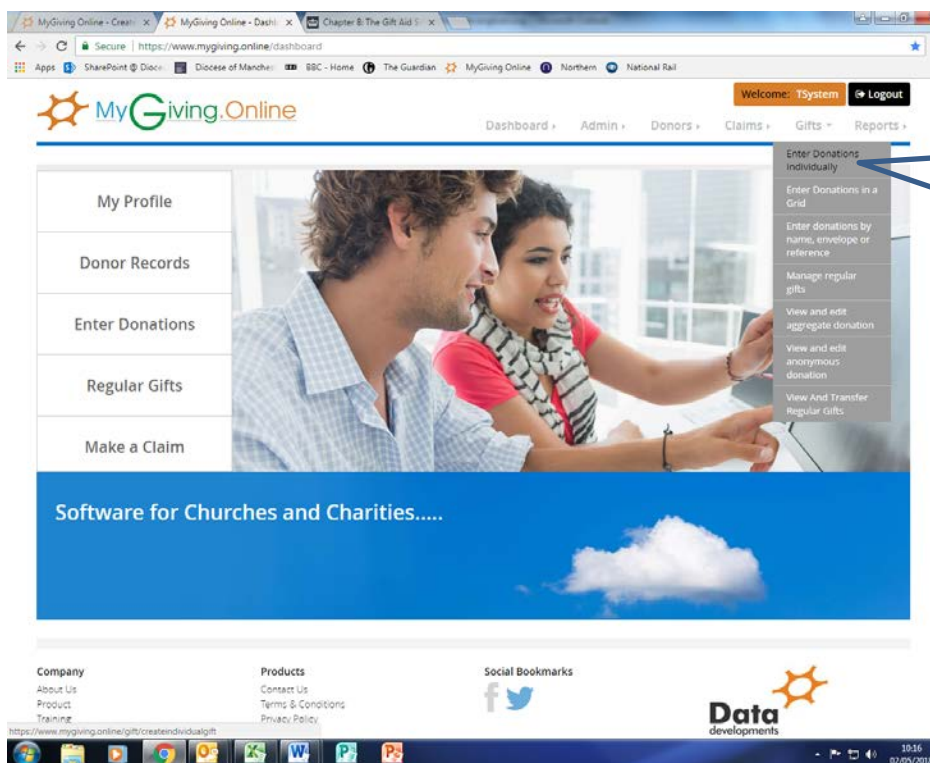
Click on Gifts and Enter Donations individually.

- Step 2

Type in your donor's details.

Type in the donation date, click on today's date and then enter the donation amount.

Click on Enter donor's defaults button to enter their typical Purpose, Method and Envelope. If not, or you'd like to choose alternatives, pick them from the drop down menus.

If the donor's defaults are eligible for GASDS, you will still need to tick the Eligible for GASDS box.
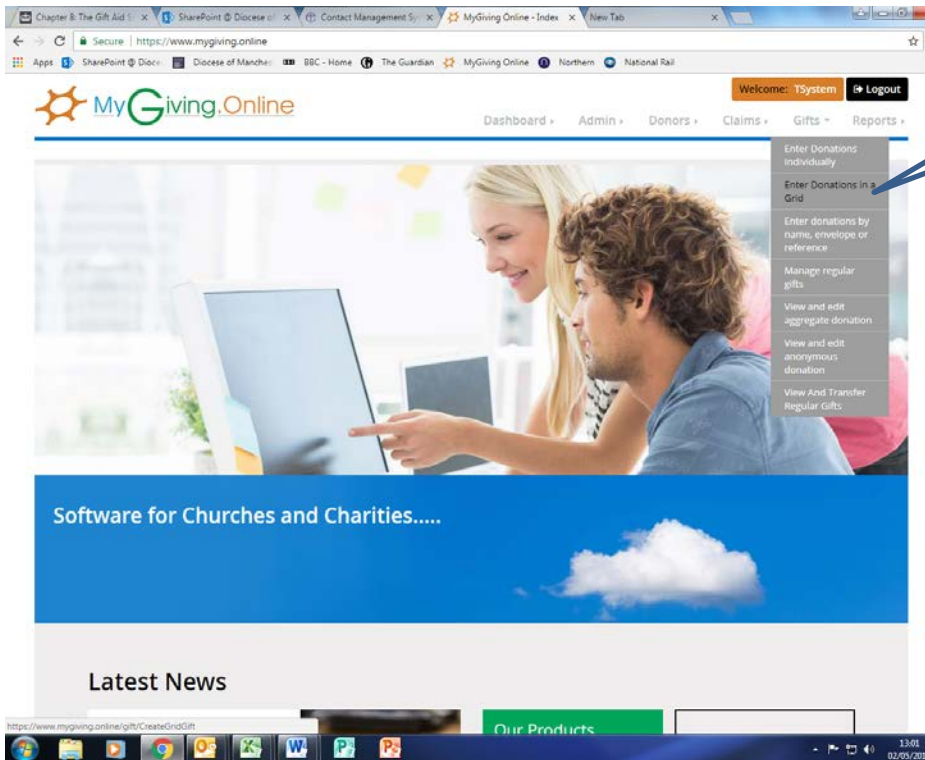
Click on Save to store your changes to the record.

- Step 3

After successfully entering a donation, a Success message will appear in a new window. Click on the cross in the top right hand corner of the green box to remove it.
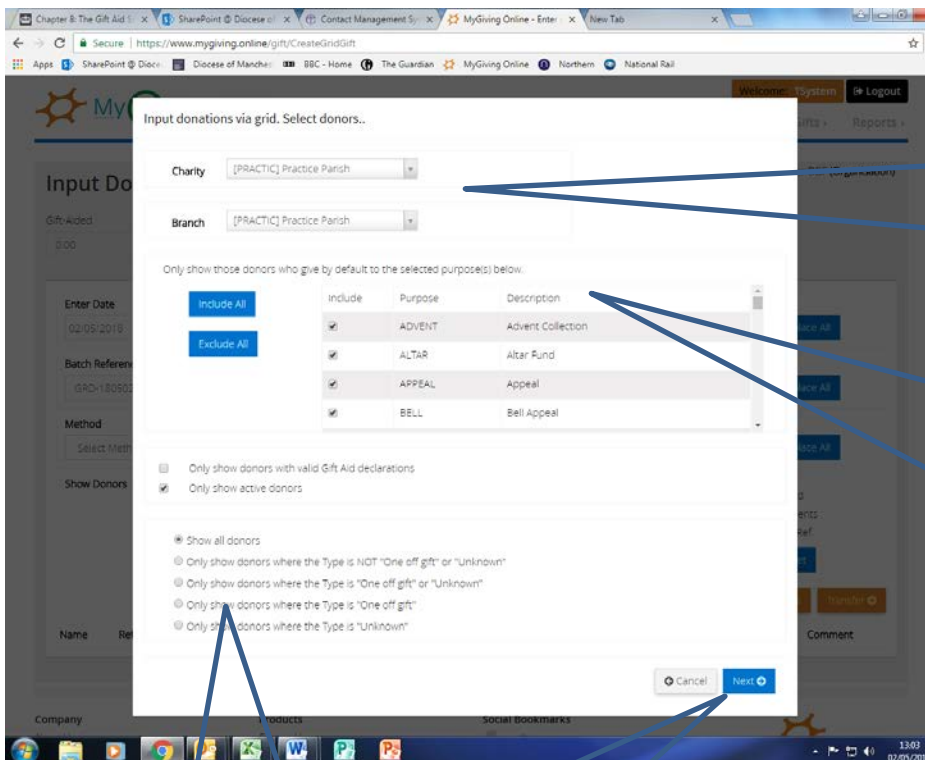
Enter your next donation as per the instructions above.

- Entering Donations in a Grid

- Step 1

Click on Gifts and Enter Donations in a Grid.

- Step 2

This pop up window will appear. If needed, ensure you have chosen the correct Charity and Branch.

You can choose to the purposes donors have chosen by default to donate to, if you wish. It automatically includes all of them.

You can choose to limit the types of donors you'll see by choosing from the options provided.

When you are happy you're with your choices, click on next.

- Step 3
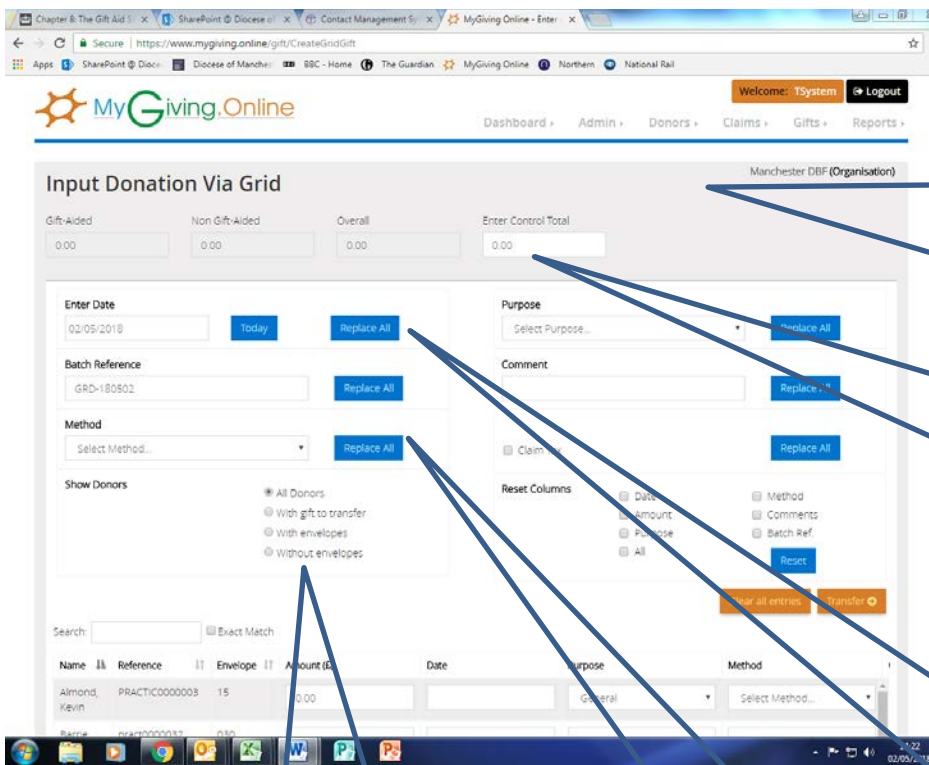
This screen will appear. Please note, this is the top of the window only and you will need to scroll down to see the rest of it.

Enter in the total amount of donations you are entering into the system in the Enter Control Total box.

Enter in the date of your donations or click on the Today button. The Replace All with add this date to all of the records at the bottom of the screen

You can narrow down the list of donors you see at the bottom of the screen by choosing for one of these options. For example, you can choose only your envelope donors.

If you are entering in lots of GASDS donations you can click on the drop down Method menu, select Cash, and Replace All. This will overwrite the Donor's default settings in the lower half of the screen.

- Step 4
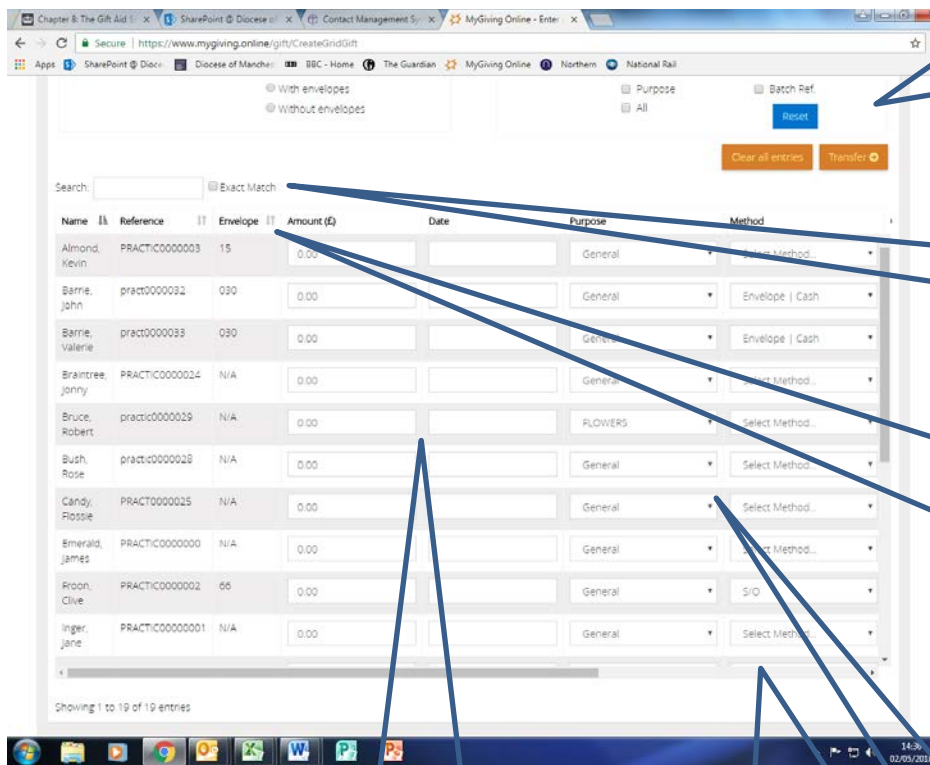
This is your screen view when you scroll to the bottom of the window.

You can search for a specific donor if you wish.

Alphanumerically order the columns showing Name, Reference or Envelope by clicking on the up/down arrows.

Your donor's defaults will appear in Purpose and Method columns, unless you elected not to show them when selecting your donors in step 2.

Enter in the donation amount, which must be less than £20 to qualify for GASDS. Enter the date(s) you wish, unless you have selected Replace All at the top of the screen.

Scroll through your list of donors to identify your Cash donors in the Method column.
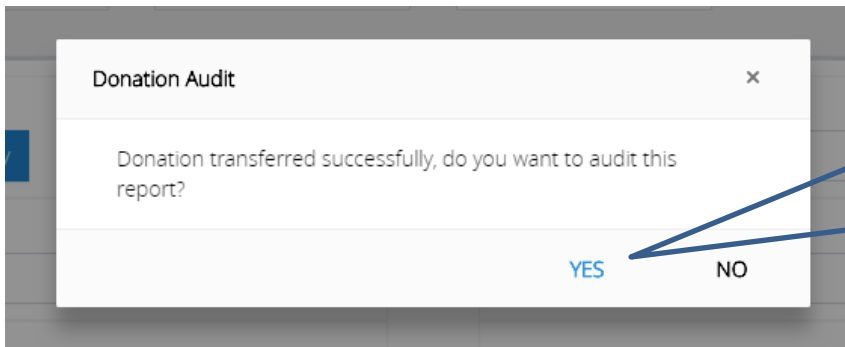
- Step 5
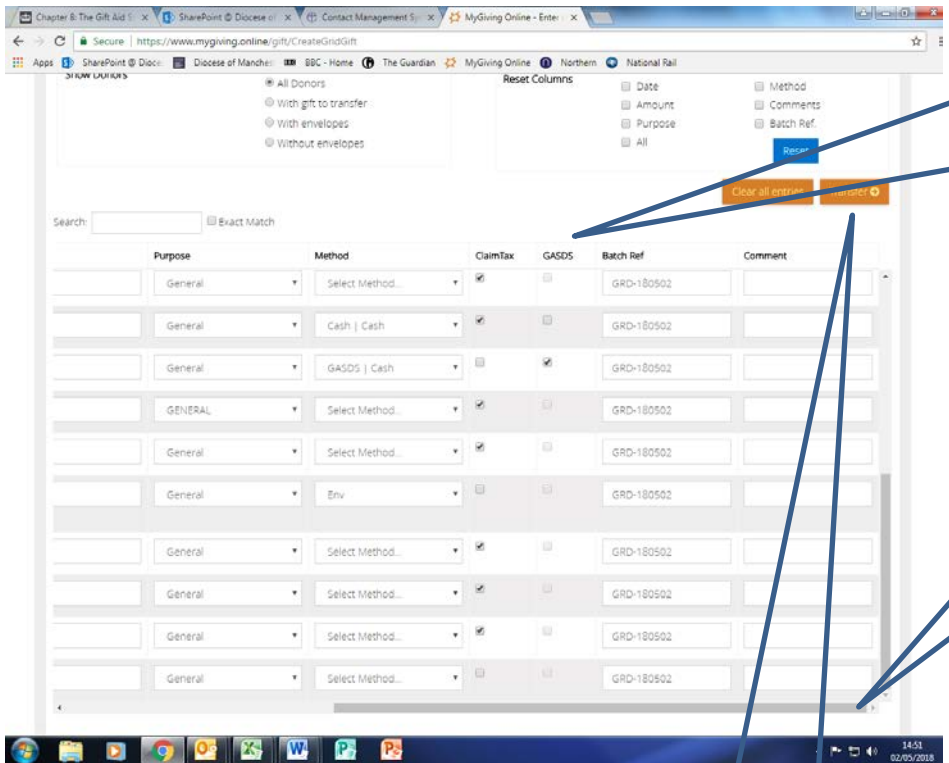
Ensure your GASDS donations are marked as GASDS Cash and the GASDS tick box has been checked.

Click on the screen scroll and move it to see the other fields on the right hand side of the screen.
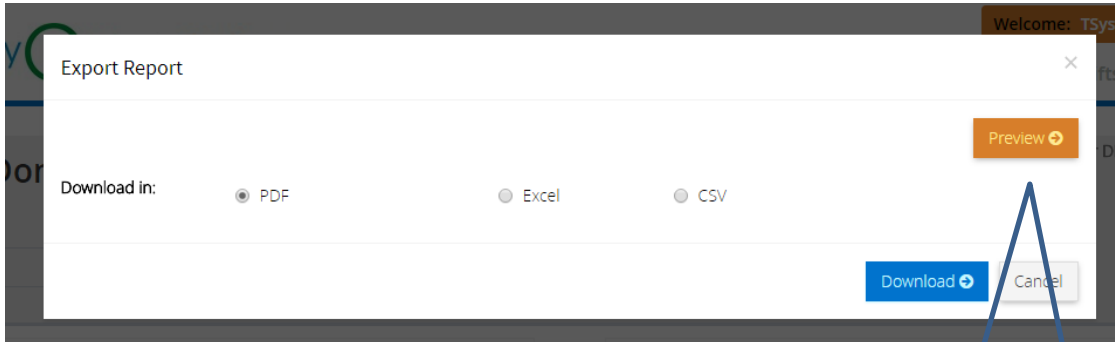
Once you have completed a final check of your donations, click on Transfer to move all the donations you have entered into the donor records.

- Step 6

Donation Audit   ×

Donation transferred successfully, do you want to audit this report?
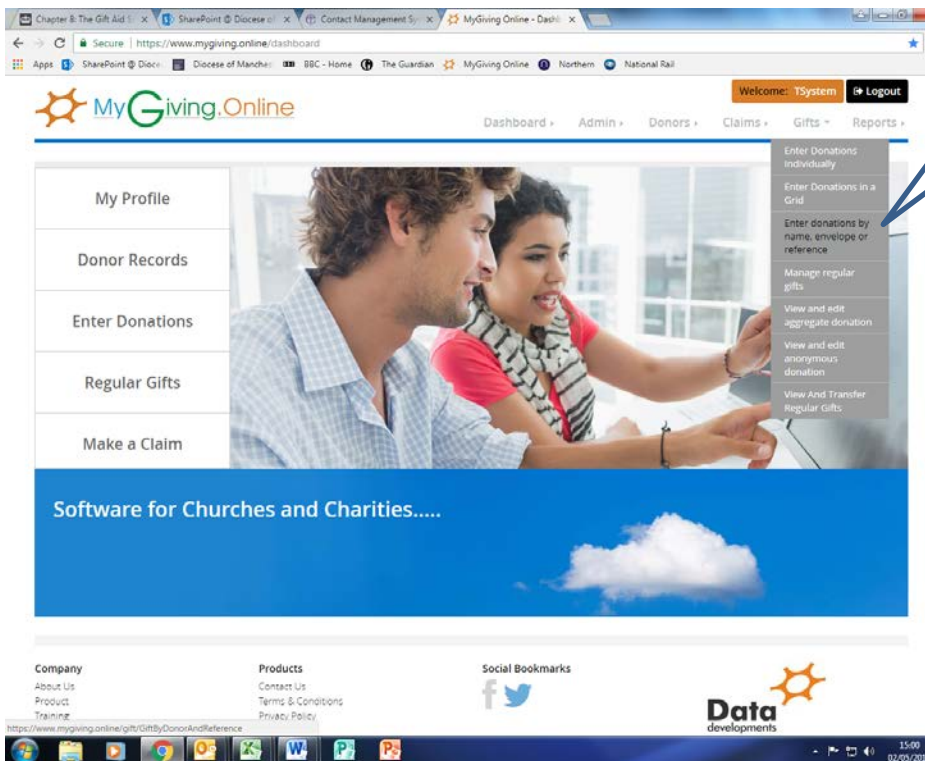
YES   NO

This pop up screen will appear asking if you'd like to produce an audit report, and click on Yes.
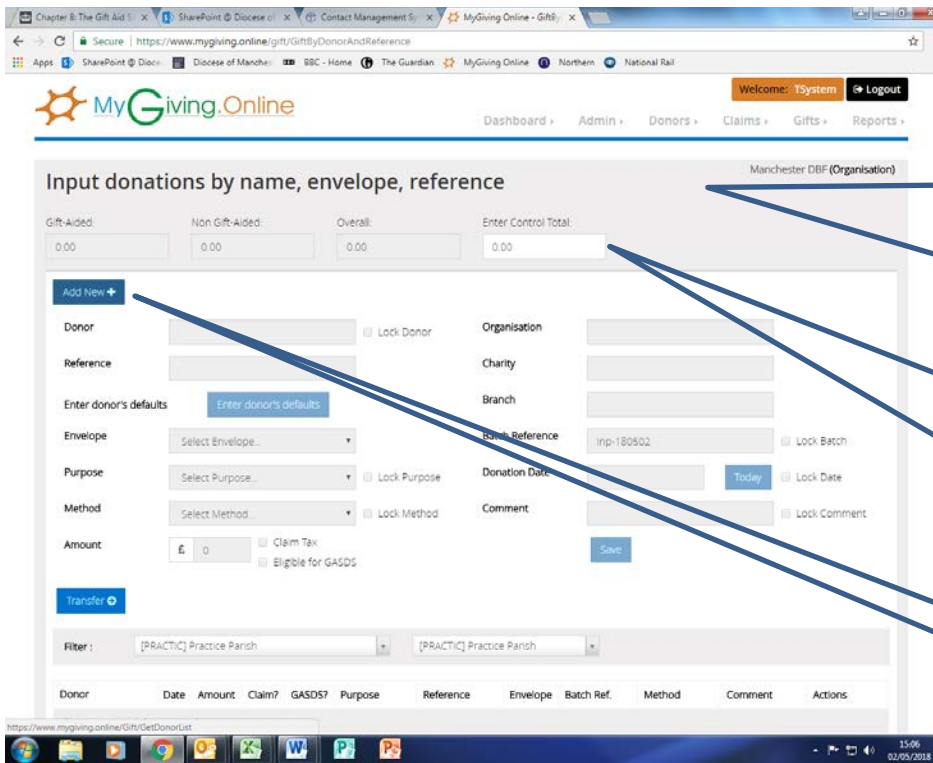
- Step 7

Click on Preview to produce a PDF copy of the audit report. This will appear in a new tab in your browser where you can print a copy.

- Entering Donations by name, envelope or reference

- Step 1

Click on Gifts and Enter donations by name, envelope or reference.
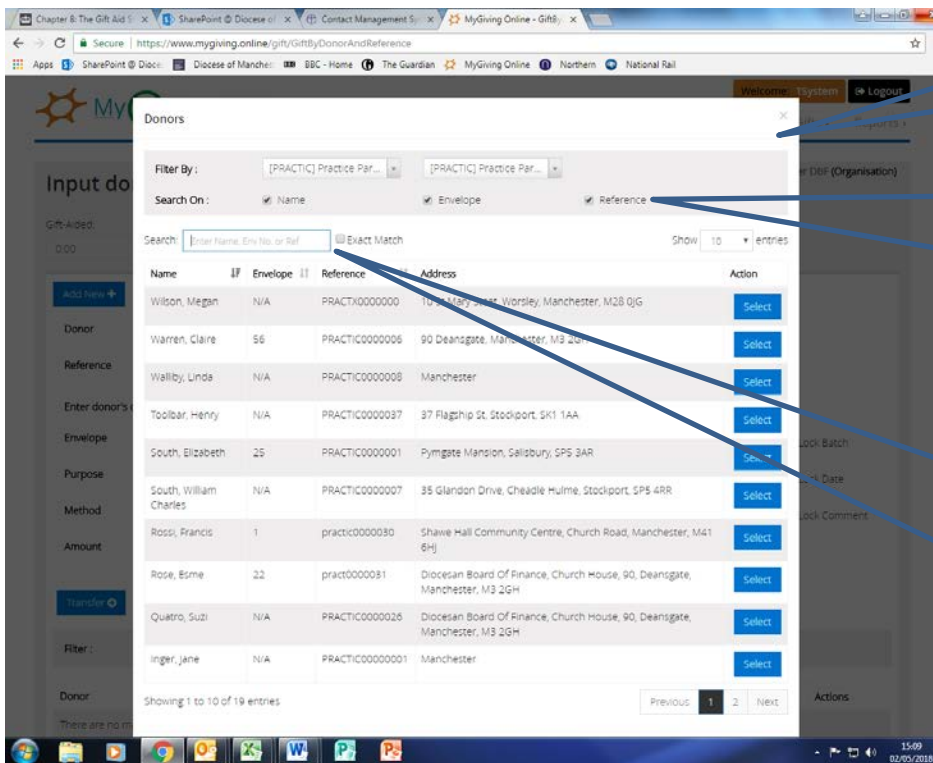
- Step 2

This screen will appear. Please note, this is the top of the window only and you will need to scroll down to see the rest of it.

Enter in the total amount of donations you are entering into the system in the Enter Control Total box.
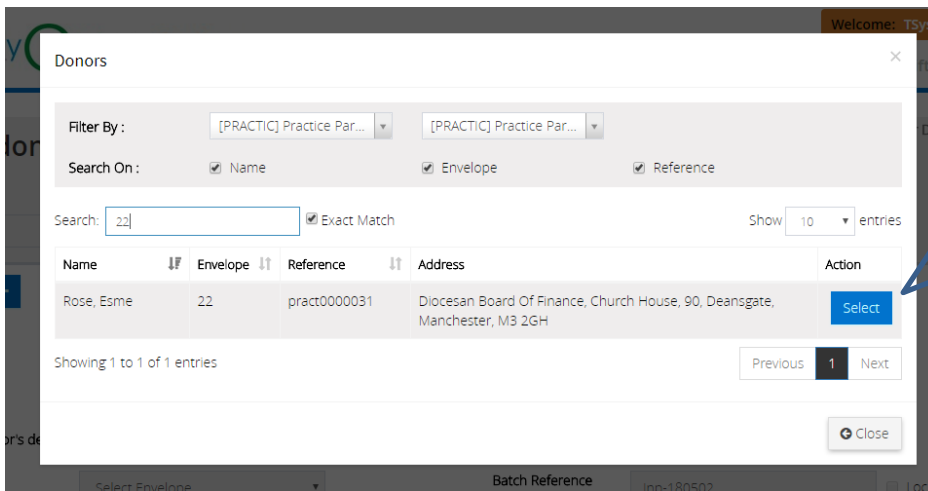
Click on Add New.
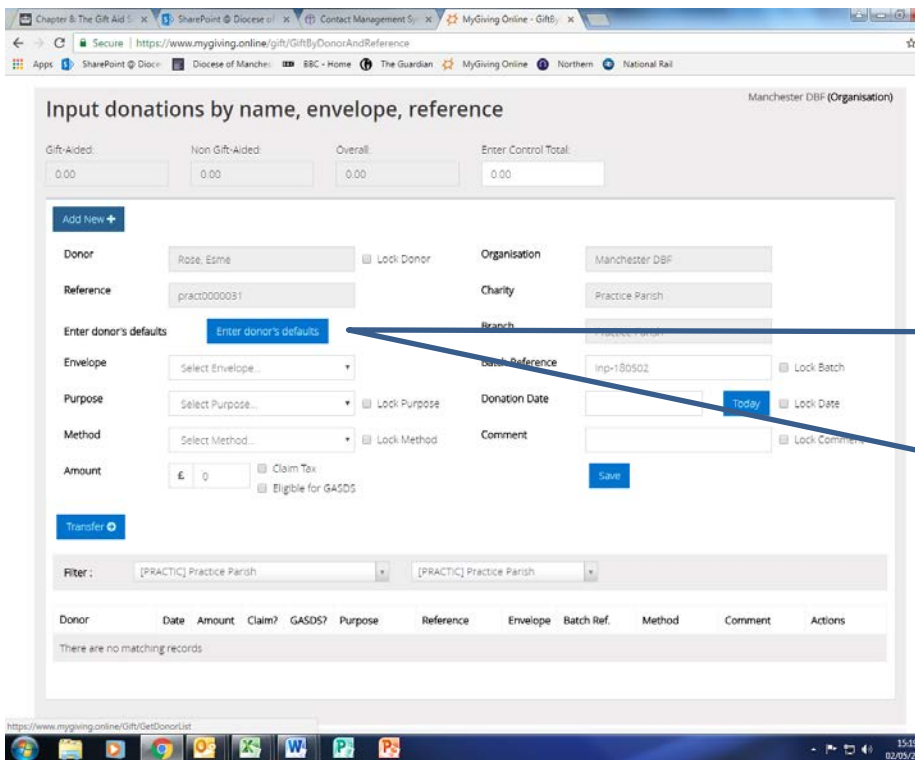
- Step 3

This pop up window will appear.

You can limit your search field by unticking the Name, Envelope or Reference boxes.

You can search for a specific Name, Envelope Number of Reference in the box. Click on exact match to narrow the search even further.
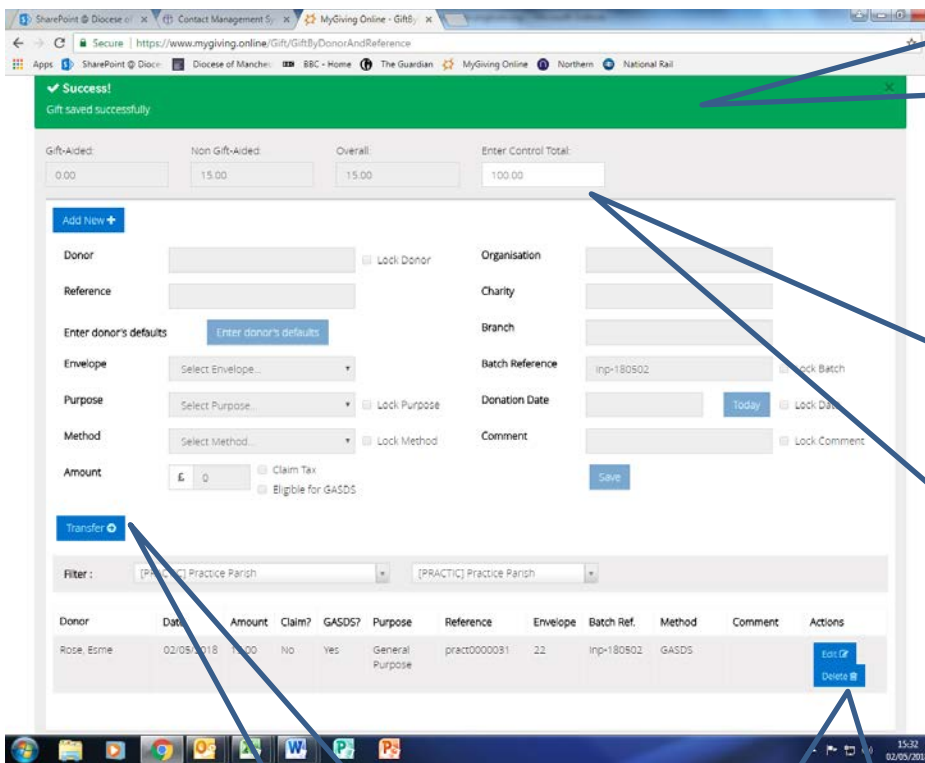
For example, I have specified Envelope 22 to produce these results. Click on select to open up the next window.

- Step 4

The donor's details will appear in a new window. Click on Enter Donor's Defaults and they will be auto populated into the Envelope, Purpose and Method fields. If you wish to choose different options you can.

Step 5

-

The donor's defaults have now appeared.

Enter a donation amount of less than £20 cash and tick eligible for GASDS.

Enter a date of your choice or click on today's date.

Click on save to store your donation against your control total.

Tick the lock boxes to retain these options for your future entries.

- Step 5

A pop up window will appear with a Success message at the top of the screen.

As you add additional new donations your Overall total at the top of the screen will increase. Once you have completed your data entry, it should reconcile with the total financial value of donations you entered in the Control Total.

Once you are happy with the donations you have entered, don't forget to click on Transfer. If you don't do this the donations will not be added to your donor's records. Afterwards you will not be able to see the donations at the bottom of the screen anymore.
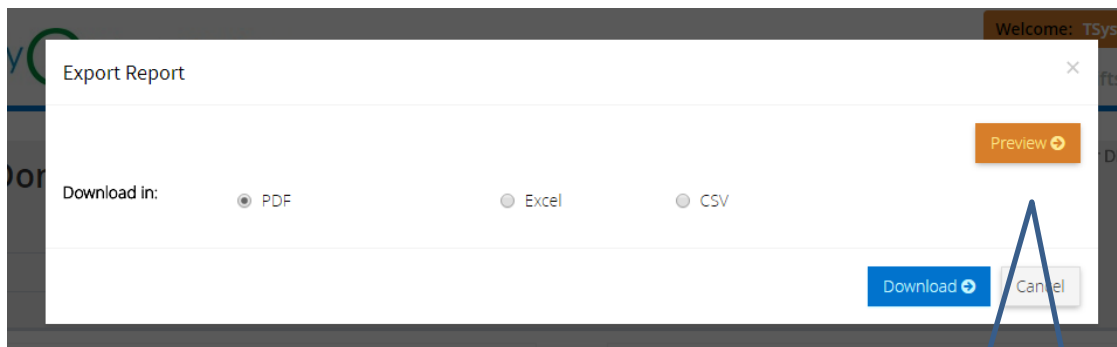
Your donations will appear at the bottom of the screen. You can still edit or delete them at this stage.
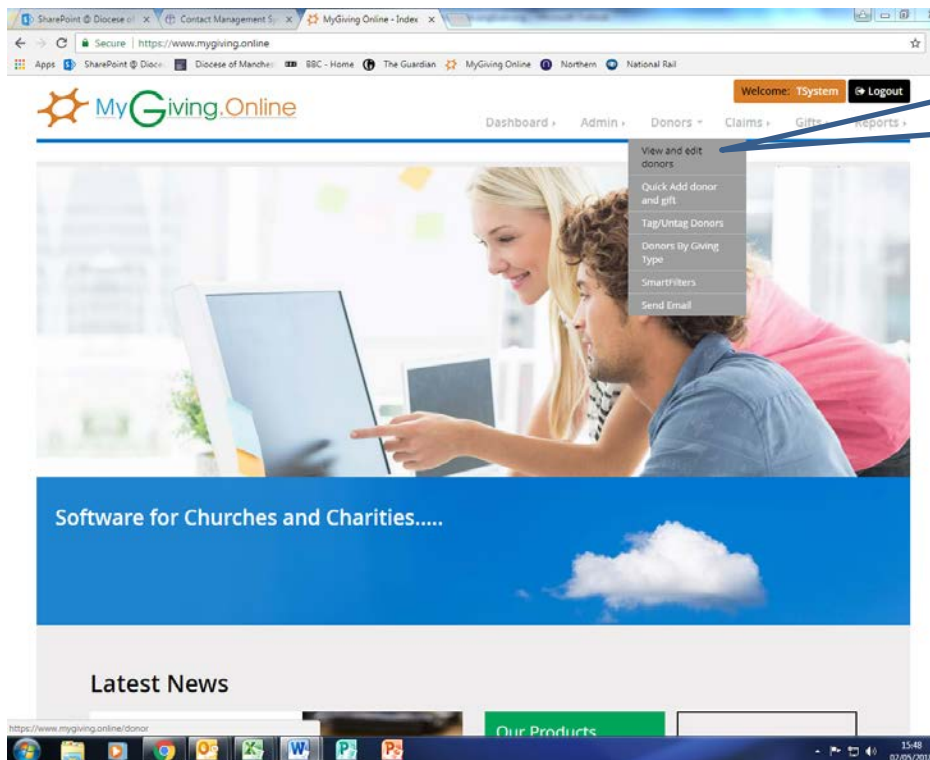
- Step 6
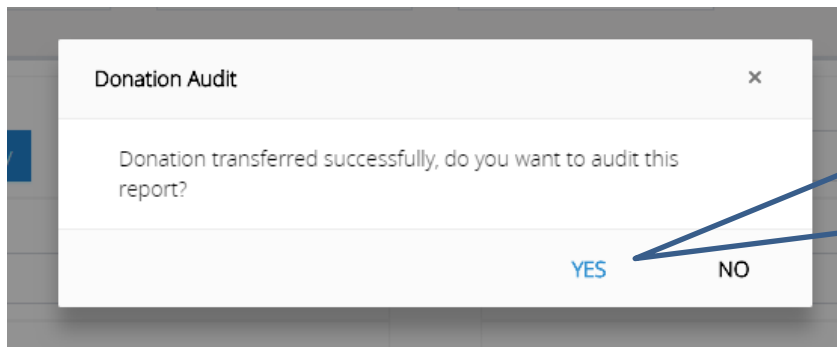
This pop up screen will appear asking if you'd like to produce an audit report, and click on Yes.
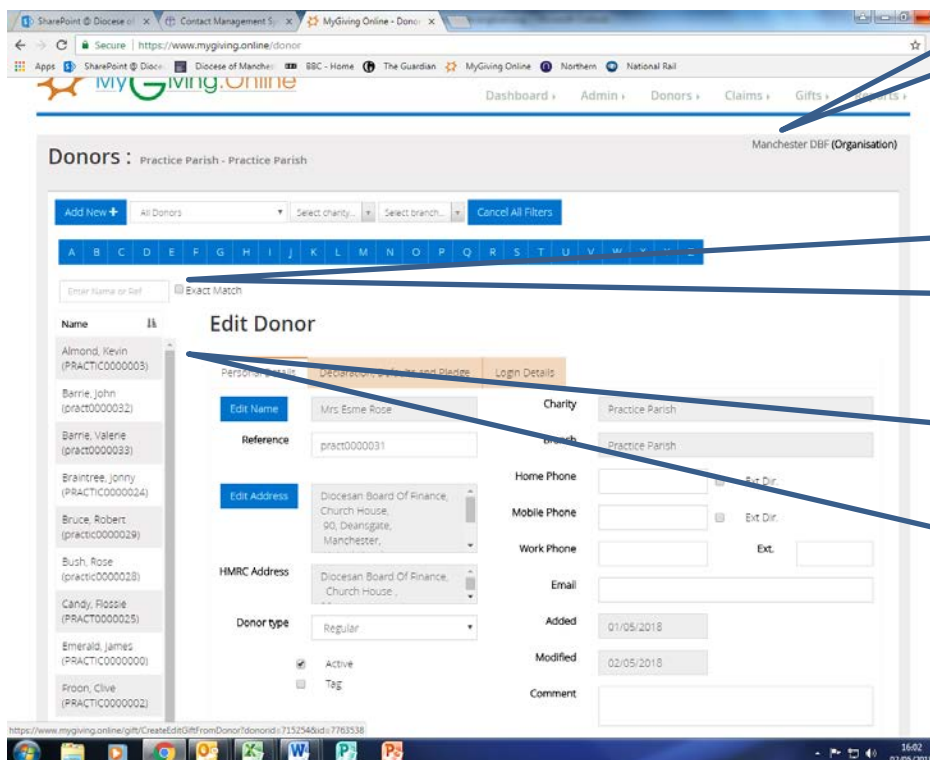
- Step 7

Click on Preview to produce a PDF copy of the audit report. This will appear in a new tab in your browser where you can print a copy.

- Entering a donation in view and edit donors

- Step 1

Click on Donors and View and edit donors.

- Step 2

This window will open up.

You can search for a specific donor by entering a Name or Reference in the box.

Alternatively, choose a name from the list of donors in the left hand column. You can limit your choice by clicking on the relevant letter from the A to Z list.

Scroll down the page to see the rest of the screen.

Click on Add Gift.

- Step 3

This window will pop up.
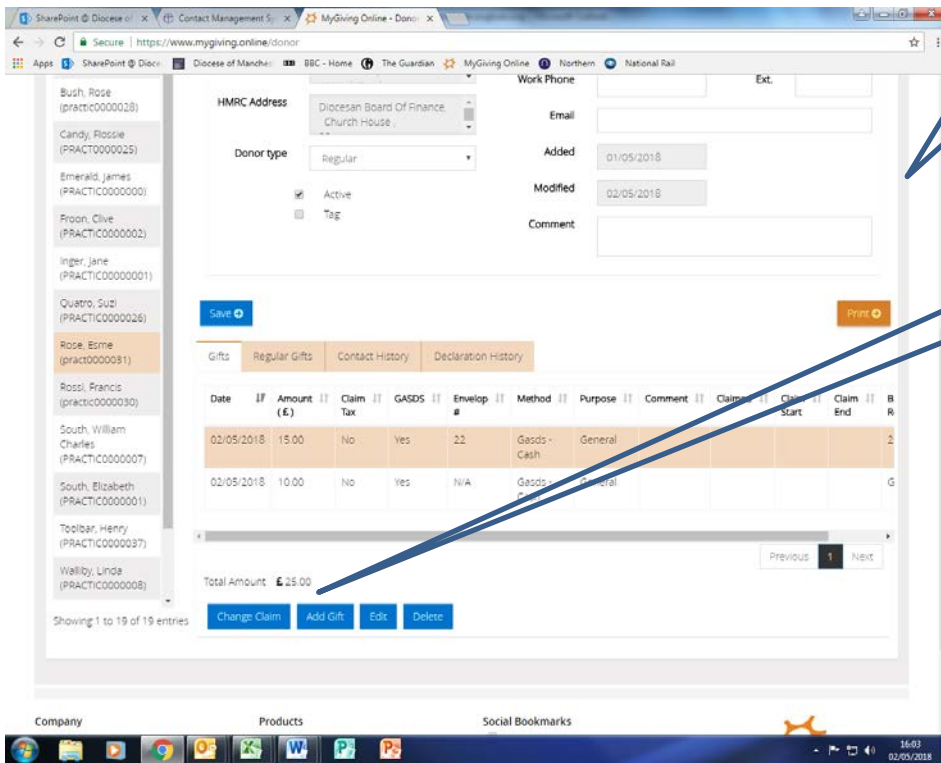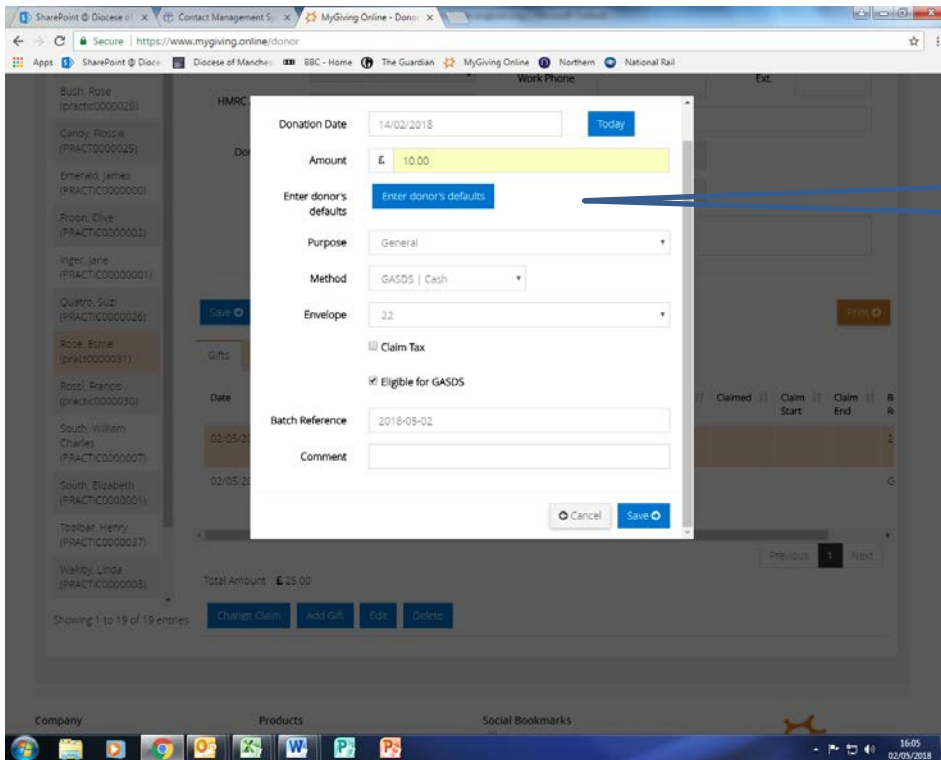
Donation Date 14/02/2018 [Today]

Type in the date of your choice or click on today's date.

Amount £ 10.00

Enter the donation amount, which must be less than £20.

Enter donor's defaults [Enter donor's defaults]

Purpose General

Method GASDS | Cash

Envelope 22

☐ Claim Tax

☑ Eligible for GASDS

Click on Enter donor's defaults or choose them from the drops down menus for Purpose, Method or Envelope, but you can pick alternatives.

Batch Reference 2018-05-02

Comment

[Cancel] [Save]

Ensure the Eligible for GASDS tick box is checked.

Click on Save to store the donation on the donor's record.

- Step 4
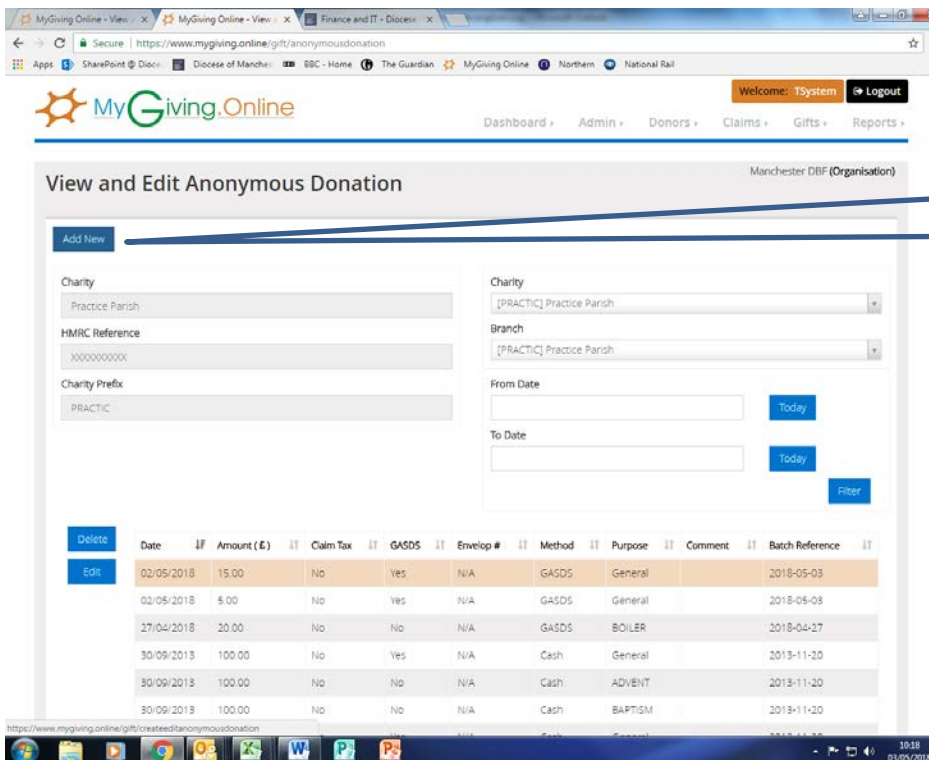

You will be returned back to the Edit Donor page. You will see the donation has been saved at the bottom of the page in the list of donations.

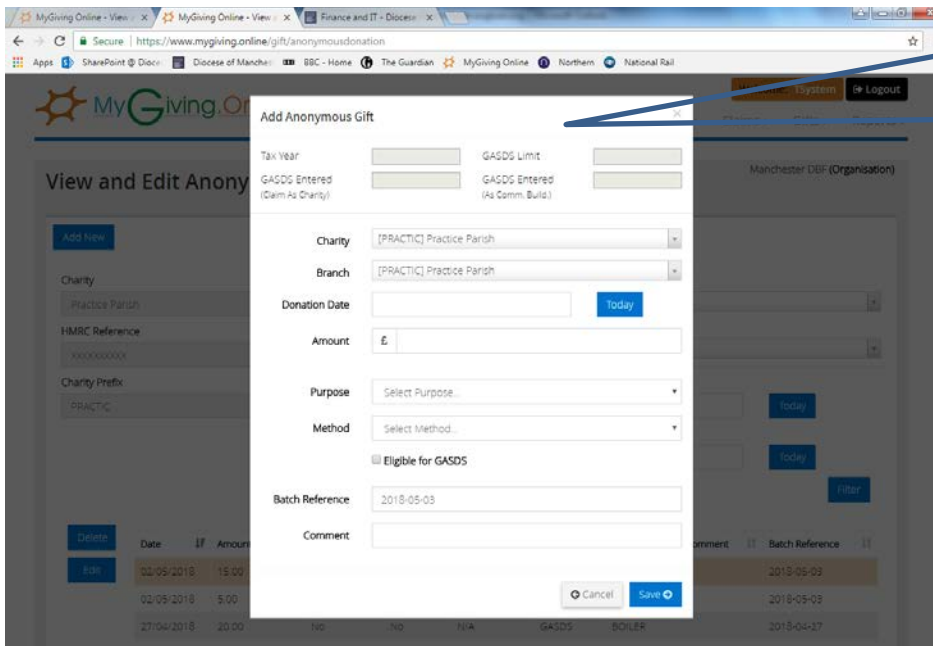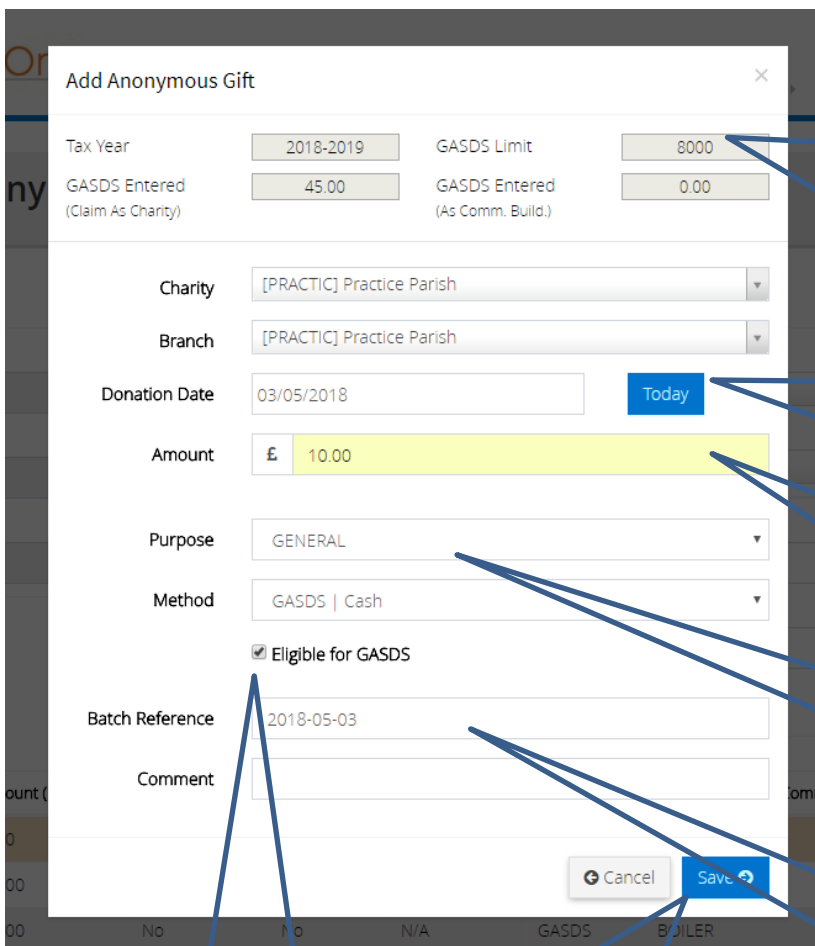- Entering anonymous donations

- Step 1

Click on Gifts and View and edit anonymous donation.

- Step 2

This window will appear and click on the Add New button.
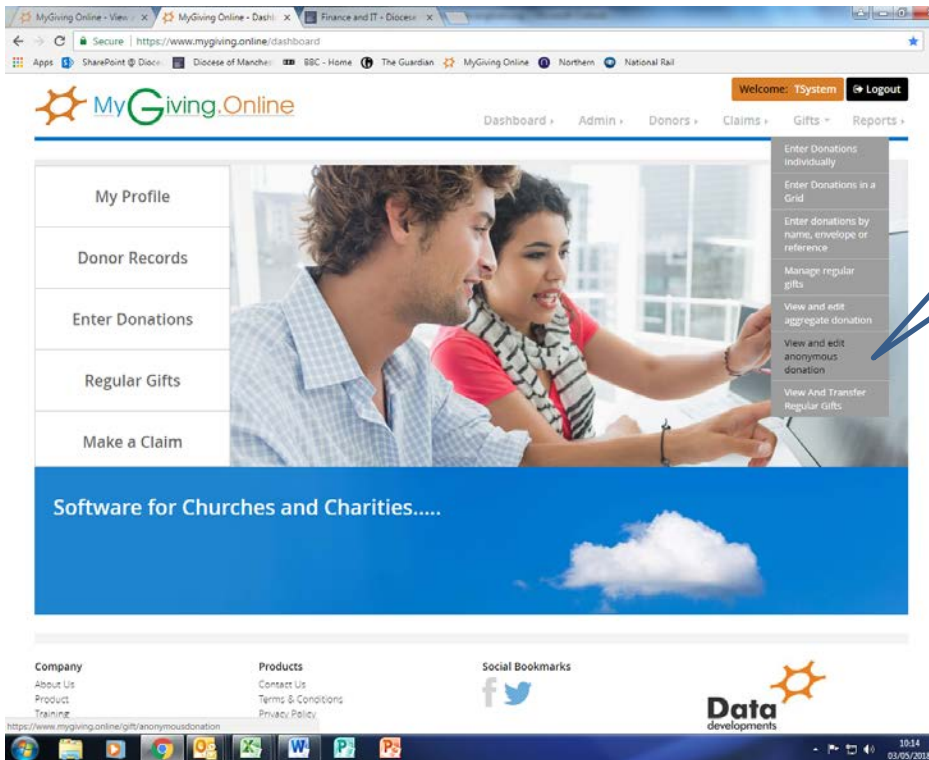
- Step 3

The Add Anonymous Gift pop up window will appear. See below for details on how to complete this.

The window will automatically provide a snapshot of your GASDS donations in the year.

Enter the date of the donation or click on the Today button for today's date.

See below for details about donation amounts.

Choose the appropriate Purpose and Cash as the method.

Choose a batch reference (e.g. date of donation) and comment (e.g. open plate).

Tick eligible for GASDS.

Click on the Save button to finish.

Add Anonymous Gift

Tax Year	2018-2019	GASDS Limit	8000
GASDS Entered (Claim As Charity)	45.00	GASDS Entered (As Comm. Build.)	0.00

Charity: [PRACTIC] Practice Parish

Branch: [PRACTIC] Practice Parish

Donation Date: 03/05/2018 — Today

Amount: £ 10.00

Purpose: GENERAL

Method: GASDS | Cash

☑ Eligible for GASDS

Batch Reference: 2018-05-03

Comment:

Cancel | Save

Enter in the gift amount. For a single gift, to be eligible for GASDS, this must be less than £20 as cash or a contactless payment.

Please note, you can add a total of anonymous donations and claim GASDS on this. To do this you will need to ensure you have kept records (e.g. a vestry sheet) showing how the total is made up of multiple cash/contactless donations of less than £20 each.

- Step 4

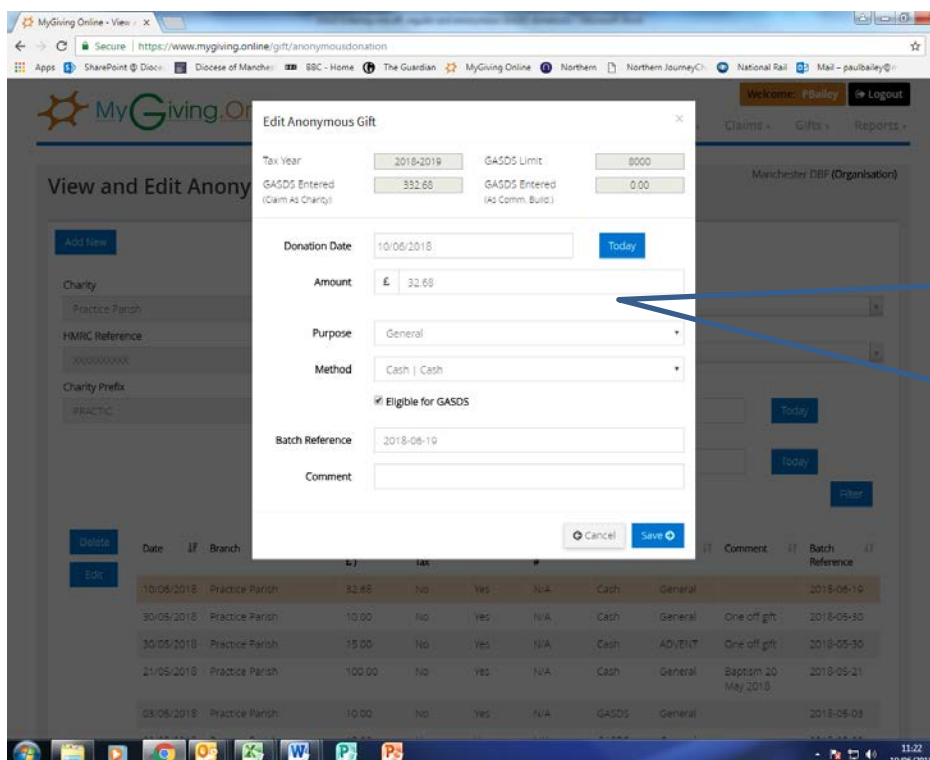Afterwards you will be returned to the View and Edit Anonymous Donation screen.

At the bottom of the screen you can see the details of the anonymous donations you have recently received.

- Step 5
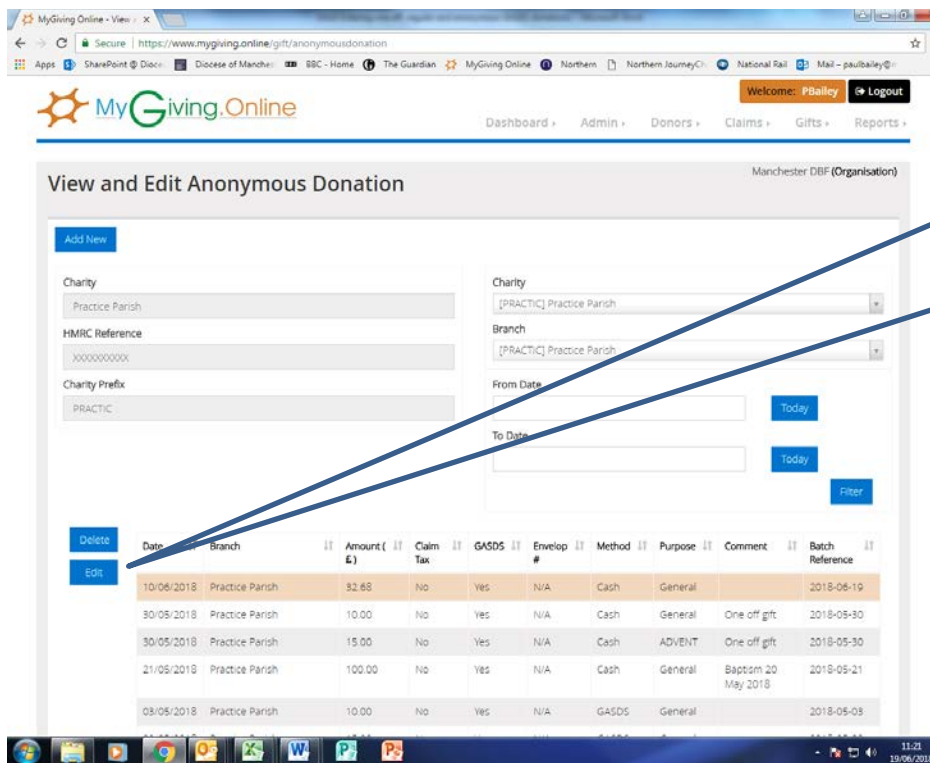
If you'd like to print a copy of your entry to attach to the vestry sheet, click on the relevant donation to highlight it, and then click on Edit.

- Step 6

This pop up will appear. Press the PrtScn (Print Screen) button on your keyboard and open a new Word document. You'll be able to paste it onto the page and then print it.