

GAL9 - Creating, viewing and editing aggregate donations

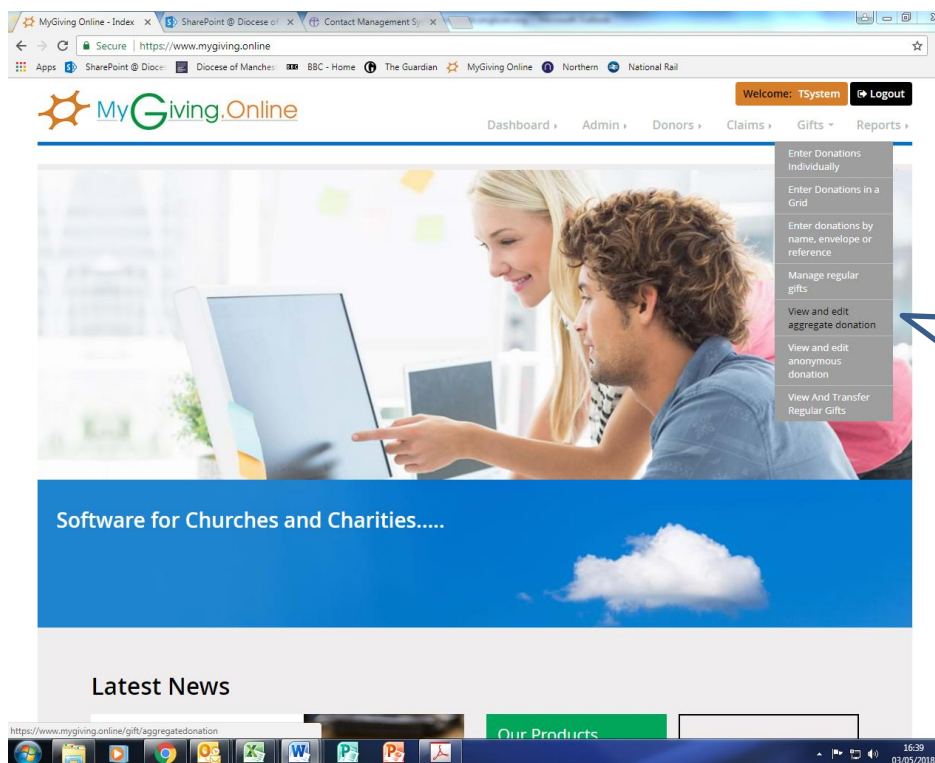
This guide shows you how to create, view and edit your Church's aggregate donations.

It is important you are clear about the purpose of this donation entry method. An aggregate donation is inputted as a single, larger gift even though it is made up of multiple smaller gifts of less than £20, and they have been received in completed Gift Aid envelopes. If you are unlikely to see this donor attending a service at your Church again, you should use this method. Rather than creating new donor records for each gift, you can add the donations together to form one aggregated entry.

For example, during a baptism service you could have received 12 completed Gift Aid envelopes from visitors each with a donation of less than £20 inside. Rather than creating 12 new donor records and entering the associated donations, you could combine them all into a single aggregated donation entry.

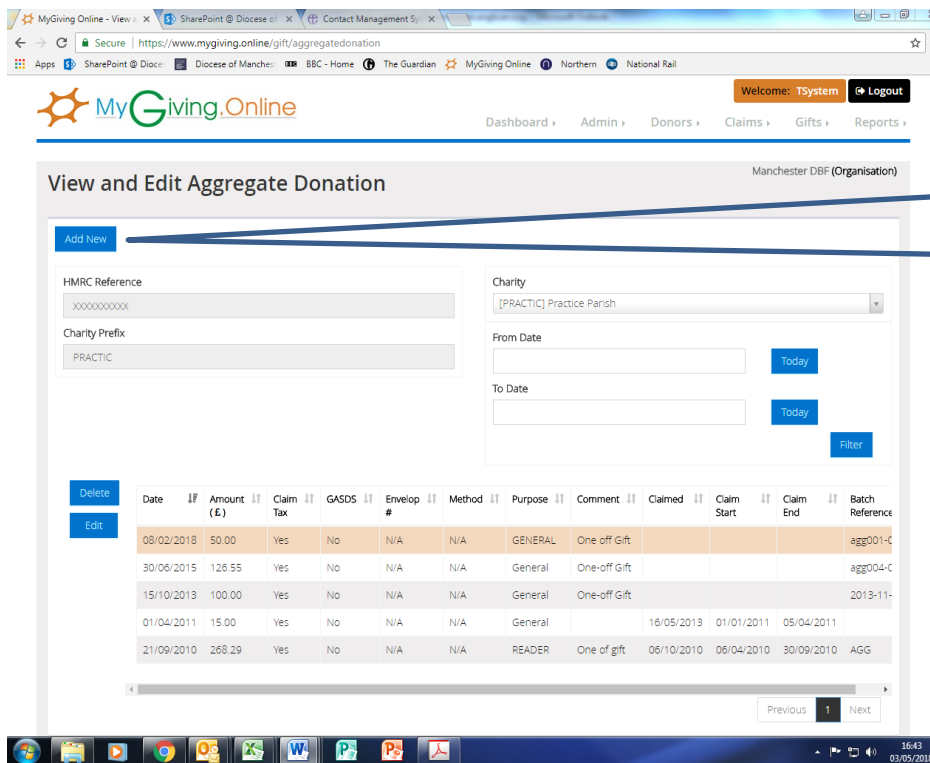
Please note if the total amount being entered is greater than £1,000 you will need to split this into two different Aggregate Donation entries.

- Step 1



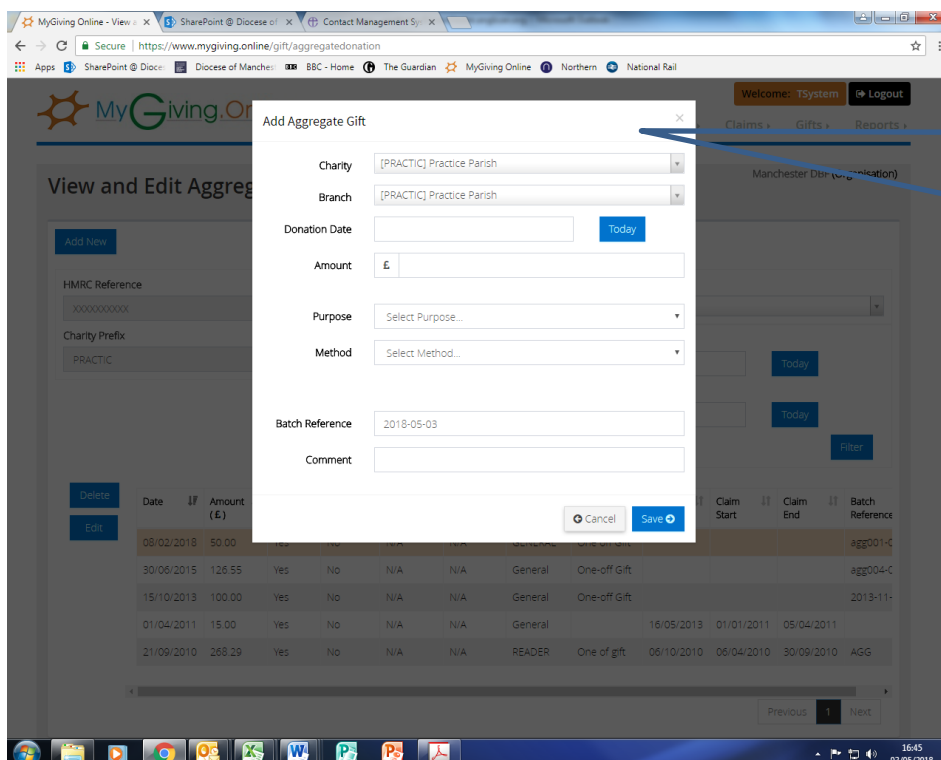
Click on Gifts and View and edit aggregate donation.

- Step 2



This screen will appear. Click on Add New to create an aggregate donation.

- Step 3



This pop up window will appear. See below for instructions on how to complete this.

The screenshot shows a web form titled "Add Aggregate Gift" with the following fields and callouts:

- Charity:** A dropdown menu with "[PRACTIC] Practice Parish" selected. Callout: "If appropriate, ensure the correct Branch has been selected."
- Branch:** A dropdown menu with "[PRACTIC] Practice Parish" selected.
- Donation Date:** A date input field with "06/05/2018" and a "Today" button. Callout: "Enter the date of donation and the total amount of aggregate donations being entered."
- Amount:** A currency input field with "£ 240.00".
- Purpose:** A dropdown menu with "GENERAL" selected. Callout: "Choose the appropriate Purpose and Method (e.g. Envelope or Cash)."
- Method:** A dropdown menu with "Env" selected.
- Batch Reference:** A text input field with "Agg 2018-05-06". Callout: "Choose an appropriate name for your Batch Reference. This should include the date of the service and the total number of envelope that makes up the donation (e.g. Agg 06052018-022). You can also enter a descriptive comment about the donation."
- Comment:** A text input field with "12.30 p.m. baptism service 6/5/2018".
- Buttons:** "Cancel" and "Save" buttons. Callout: "Click on Save to store your Aggregate Donations."