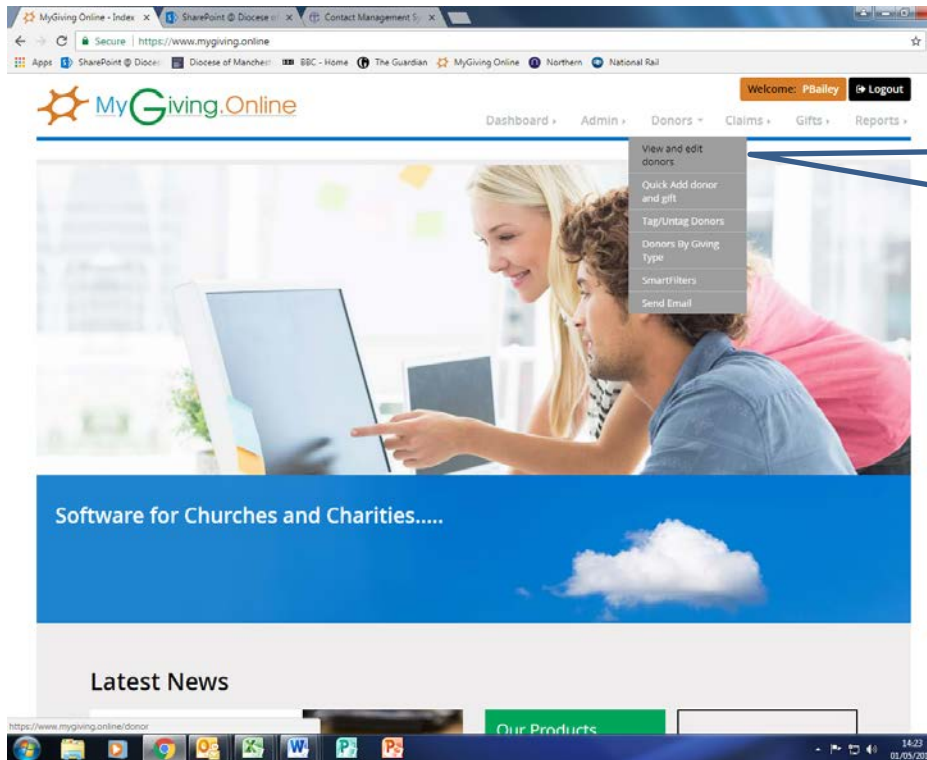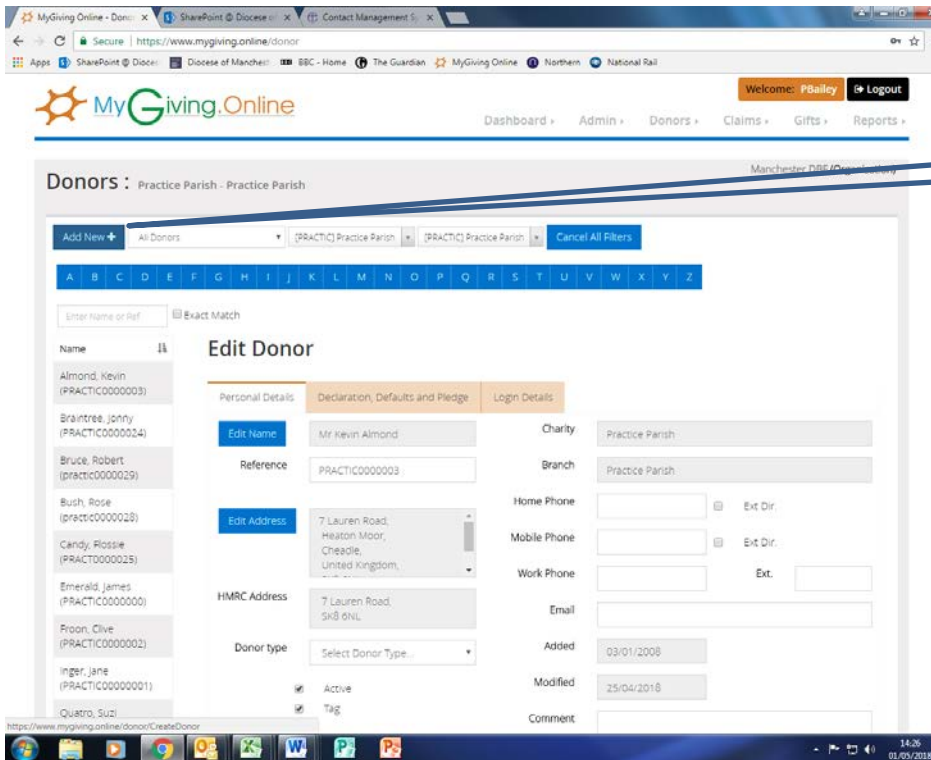## GAL20 - Creating a donor record

This guide shows you how to create a new donor record onto the system. Please ensure you follow all of the steps outlined in this step by step guide otherwise it will create errors you will need to rectify before authorising your quarterly claim.
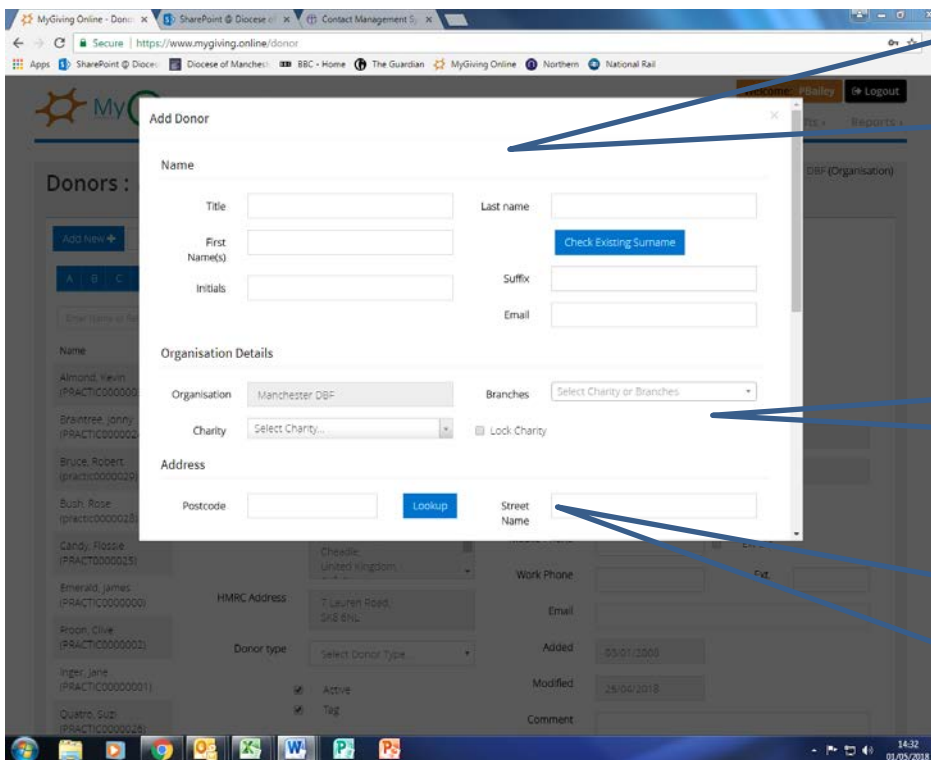
- Step 1

Click on Donors and View and edit donors.
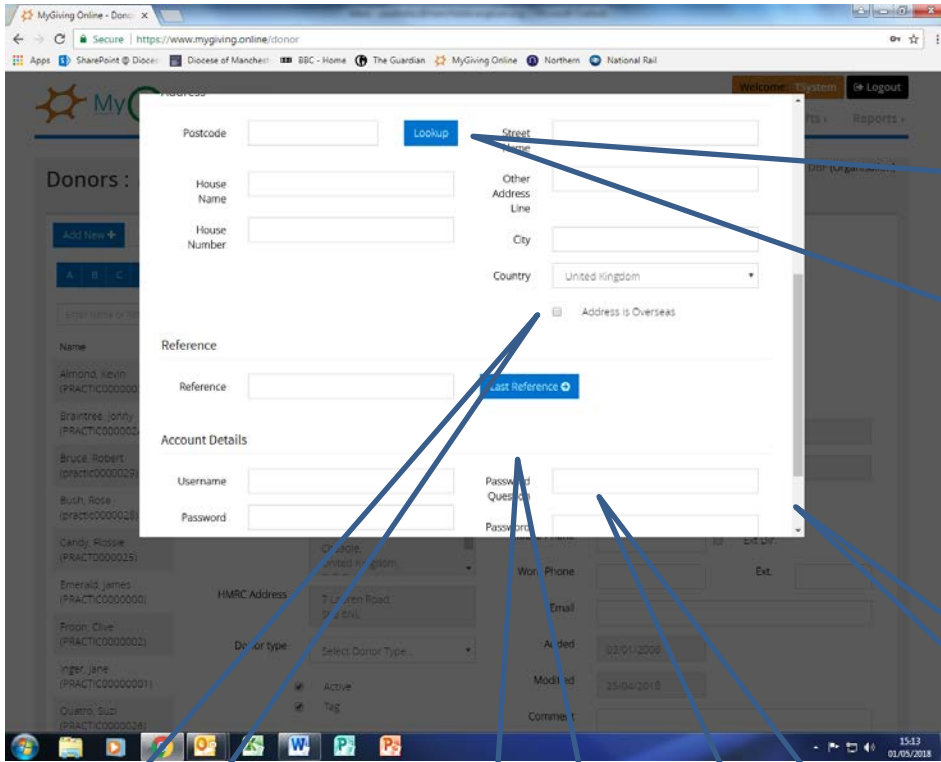
- Step 2

Click on Add New.

- Step 3

Type in your donor's title, first name, and last name. If appropriate you can also add a suffix (e.g. MBE) and an email address.

If required, choose the charity and branch.

You'll need to scroll down to complete the rest of the details. Instructions are on the next screenshot.

If you know the post code, type it in and click on Lookup. A drop down box will appear, click on it and select the correct address. This will auto populate the address fields. You can type in the address if you'd prefer.

If the address is overseas, please tick the box.

Click on Last Reference and it will provide the last number used. Follow the instructions as shown below.

If you wish to allow your donors to access their own details using the 'Donor App', please complete the account details section.

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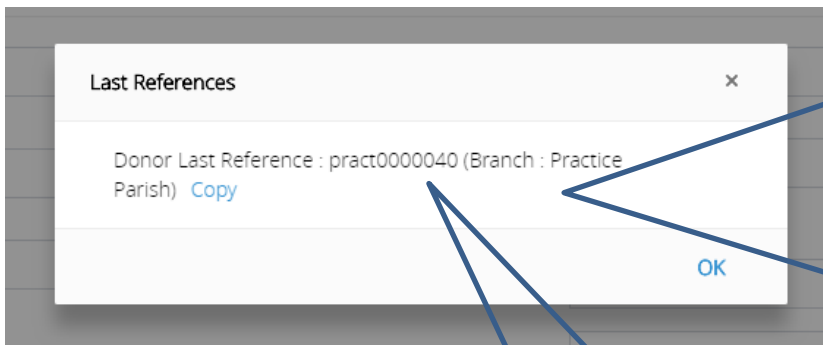
It shows the last reference numbers you have used for a donor record. You can write the reference number down and type it in or click Copy, then OK. You'll be returned to the previous screen, click in the Reference box, right click and past the number into it. Don't forget to add the next sequential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

Please do not change the reference number format. The first part of the reference contains your unique Parish code and a sequential number for each donor.

- Step 4

After creating a donor this page will appear.

If you wish, you can enter phone numbers and an email address.

Click on Save when you have made any changes.

Ensure the active box is ticked; otherwise your donor will not appear in your searches.

- Step 4

Click on the Declaration, Defaults and Pledge tab.

Choose the most appropriate Giving Type (e.g. choose Weekly if they use a weekly envelope. The rest of the fields can be left blank unless you wish to calculate a pledge amount from your donors for the year.

Choose a Purpose and Method normally used by this donor.

To add a Gift Aid declaration, please see the instructions below.

Click on Save to store your changes.

Click on Add New Envelope to allocate a new number, and follow the instructions below.

- Step 5

Type in the envelope number when the Add Envelope pop up window appears. You can also type in a comment if you wish. Click on Save to store your changes.

- Step 6

Click on the Request a Change button and the pop up window below will appear.

Don't forget to tick the Claim tax default box.

Declaration Details

Current Declaration End Date

[   ] Today

Declaration Date*

[08/01/2019] Today

Valid From*

[08/01/2014] Today

Valid To

[   ] Today

Reason for change*

New declaration. Copy on its way via email.

◉ Cancel   Save ◉

Firstly, the date the Gift Aid declaration dates was signed needs to be added. To do this you can either type the date into the Declaration Date box, select the date using your mouse or click on Today to make your selection.

Secondly, a Valid From date needs to be added. To do this you use the method explained above. Don't forget you can back date the Valid From date four years from the Declaration Date.

In the Reason for change box, please type in an explanation of why you are adding a new Gift Aid Declaration. For example, this could be a new donor to your Church. Scan/copy/take a photo of the declaration and send this to the Gift Aid team via post or email.

Click on the Save button to store your changes.
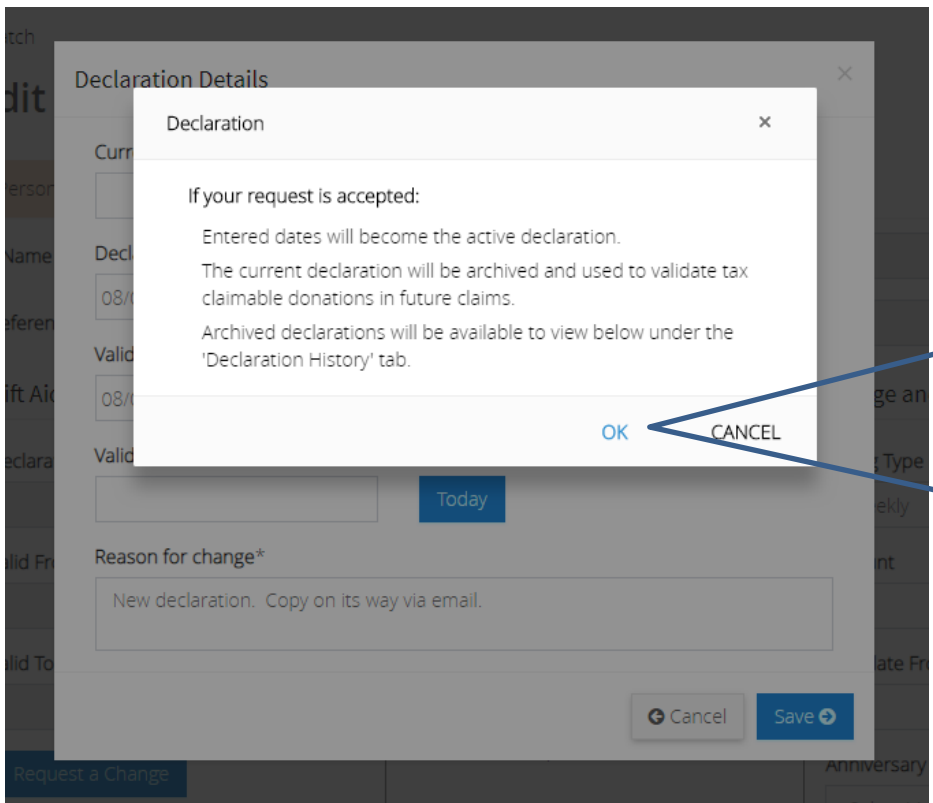
Afterwards this pop up box will appear. Unless you send the copy of the declaration through to the Gift Aid team it will not be verified and the declaration dates will not appear on the donor's record.

Click on OK to remove the pop up.

- Step 7
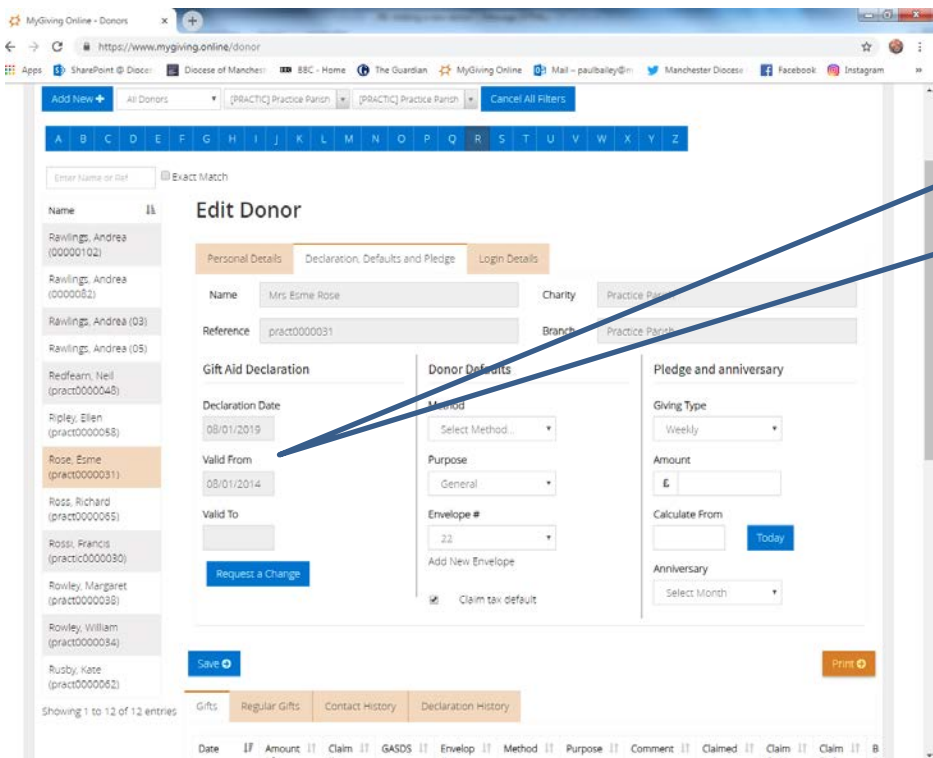
Once the Gift Aid declaration has been verified, you will be able to see the dates on the donor's record.