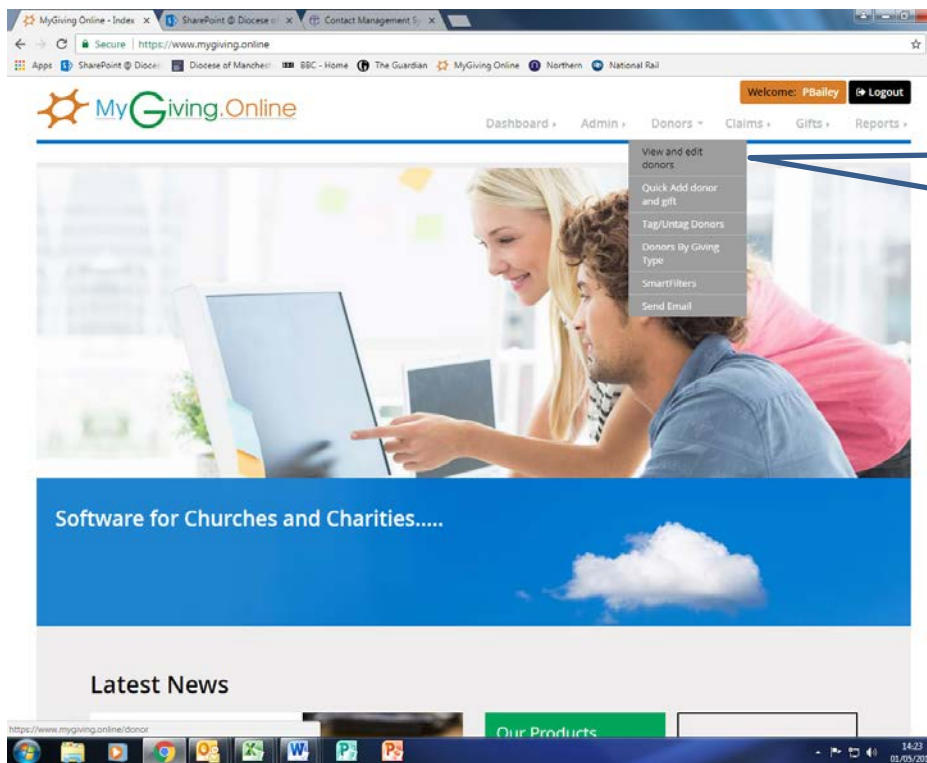## GAL7 - Creating a GASDS donor record

This guide shows you how to enter new GASDS donations 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.
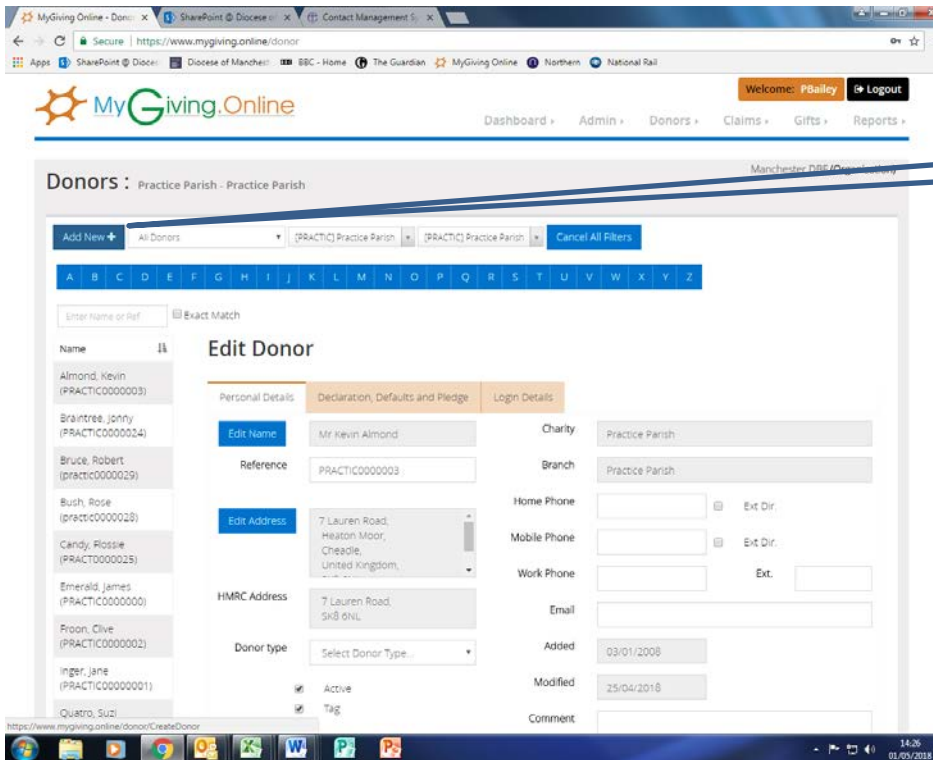
Please refer to GAL8 - Entering one off, regular and anonymous GASDS donations for further guidance on how to input GASDS donations for your Church.
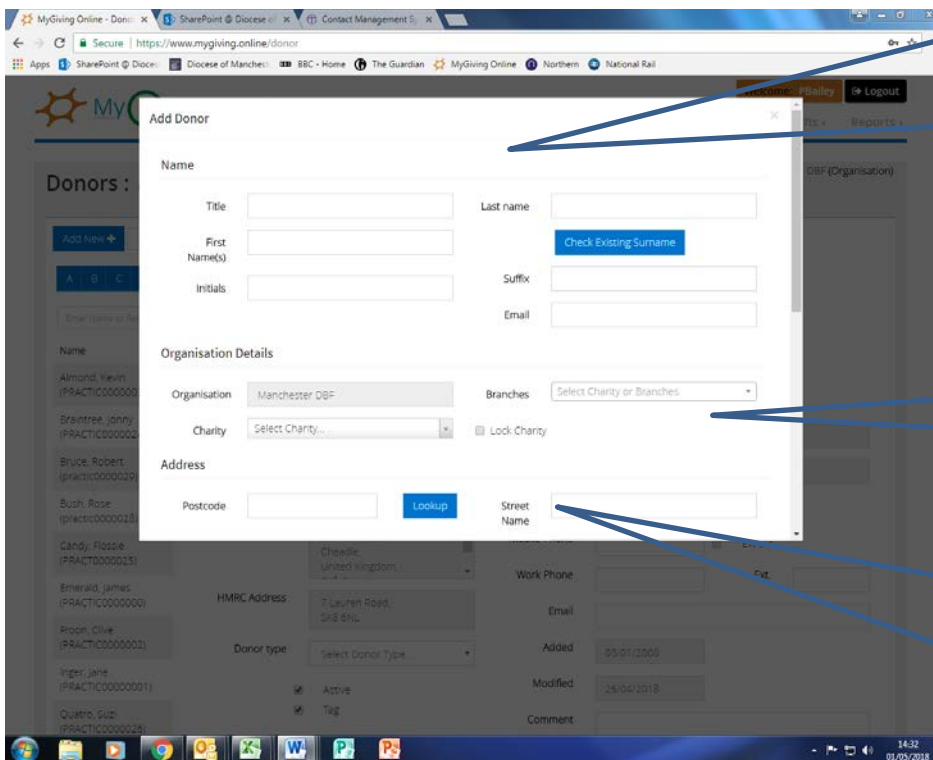
- Step 1

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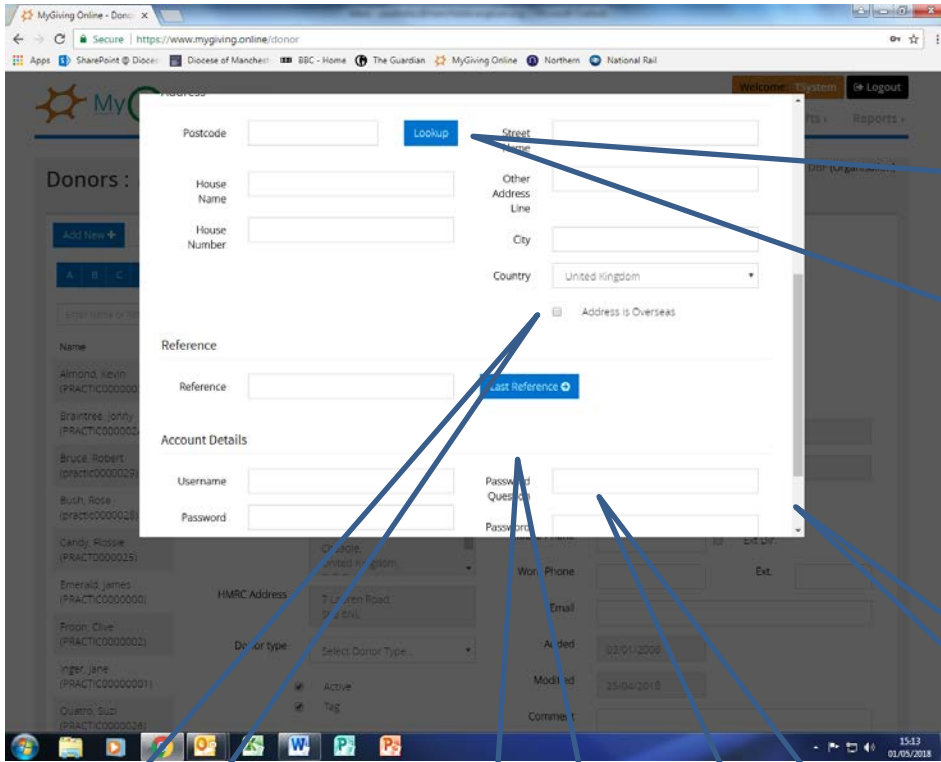
- Step 2

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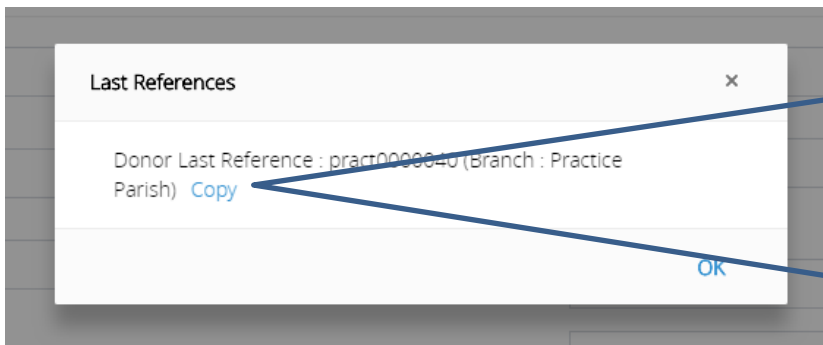
If you know the post code, type it in and click on Lookup. A drop down box will appear, click on it and select the correct address. This will auto populate the address fields. You can type in the address if you'd prefer.

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.

Last References

×

Donor Last Reference : pract00000040 (Branch : Practice Parish) Copy

OK

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).

- 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 (it should be Cash or Envelope only to qualify for GASDS). Leave the Claim tax box unchecked.

Ensure the Gift Aid Declaration section is left blank.

Click on Save to store your changes.

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

Match

Edit

Add Envelope   ×

Person

Name   Envelope #   [   ]

Referen

Gift Aid   Comment   [   ]
                            [   ]   ge an

Declaration Date   [⟳ Cancel] [Save ➔]

Declaration Date   Method   Giving Type

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.