GAL12 - Entering one off, regular and anonymous Gift Aid donations

This guide shows you how to enter new 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

1. Entering Donations Individually

- Step 1
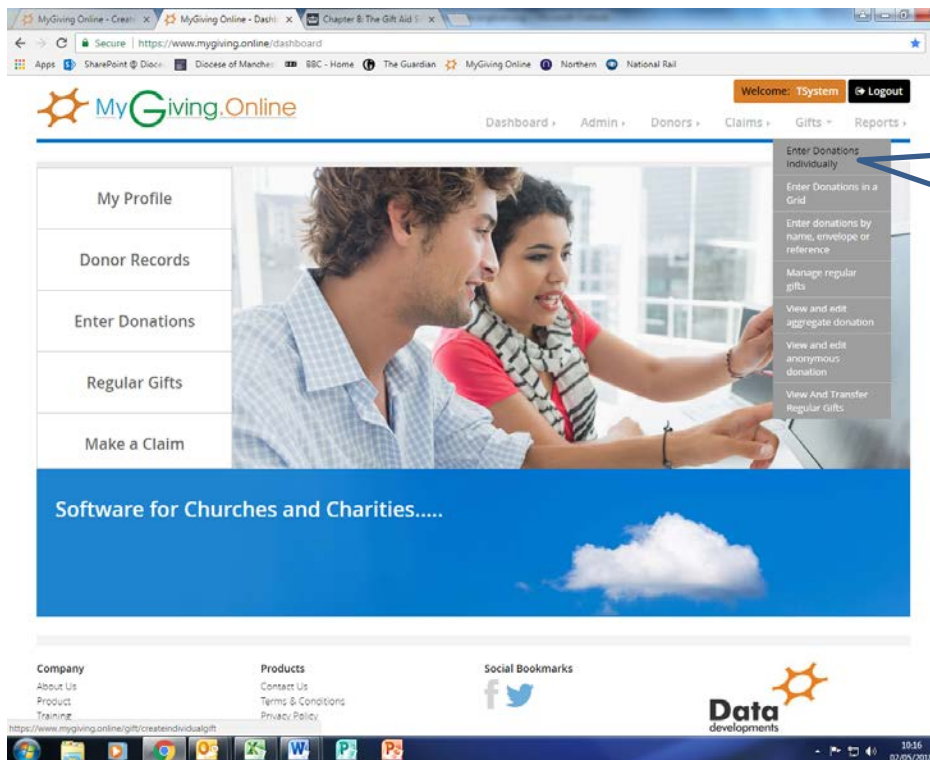
Click on Gifts and Enter Donations individually.

- Step 2

Type in your donor's details.

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

If you have already entered the donor's defaults, click on Enter donor's defaults button. If not, or you'd like to choose alternatives, pick them from the drop down menus.

If the donor's defaults have been entered to be tax efficient, the Claim Tax box will be pre-ticked.
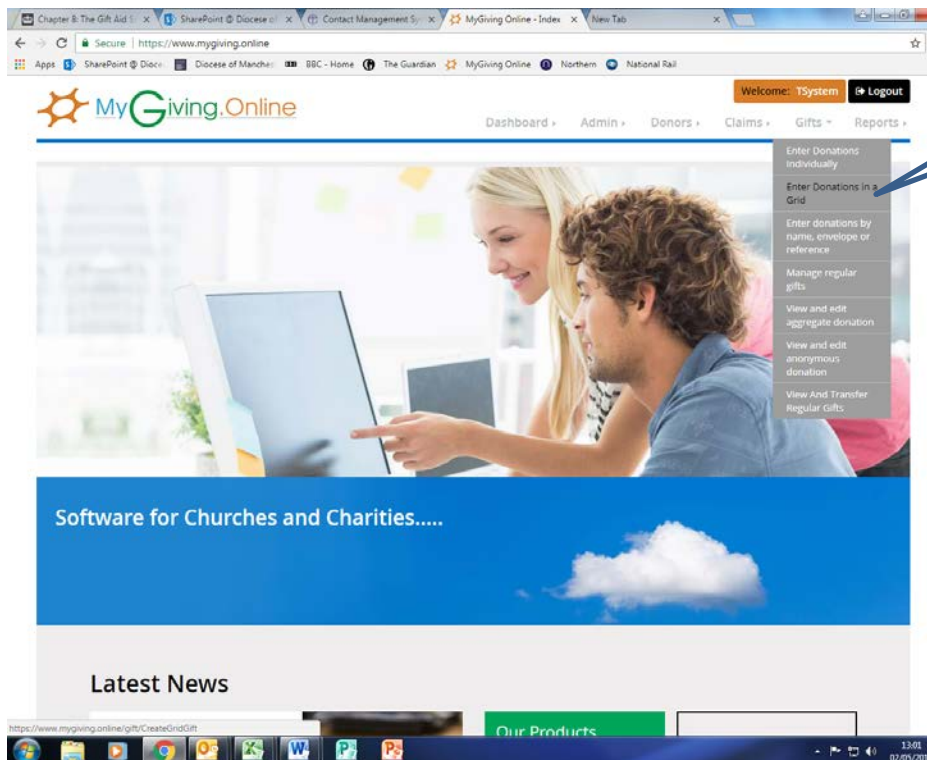
Click on Save to store your changes to the record.

- 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.

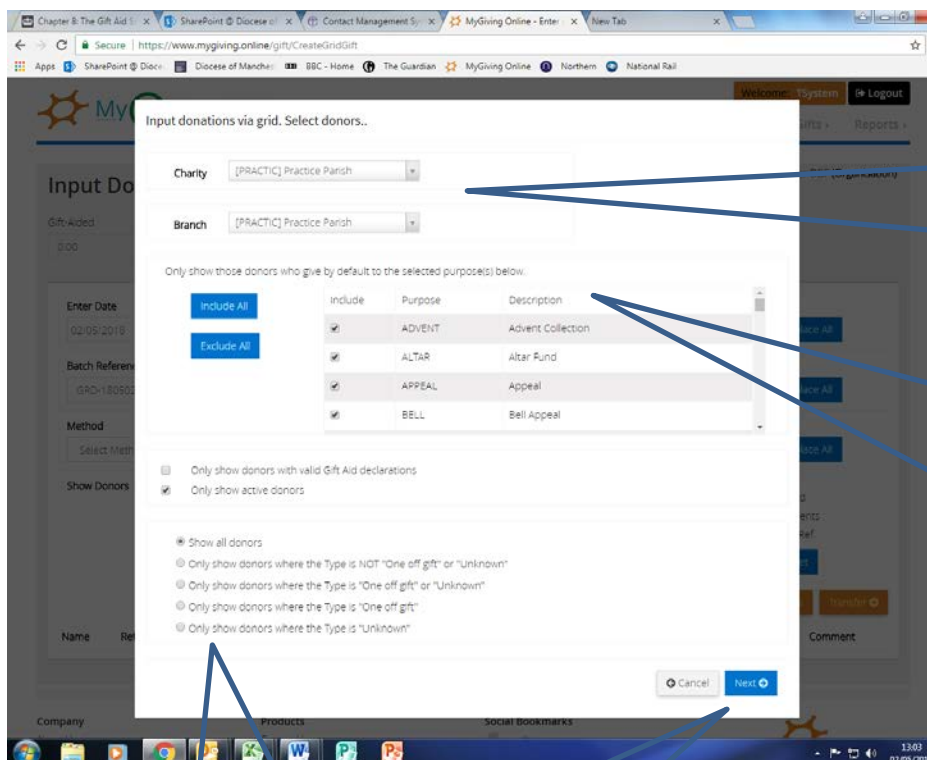Enter your next donation as per the instructions above.

2. 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 your choices, click on next.

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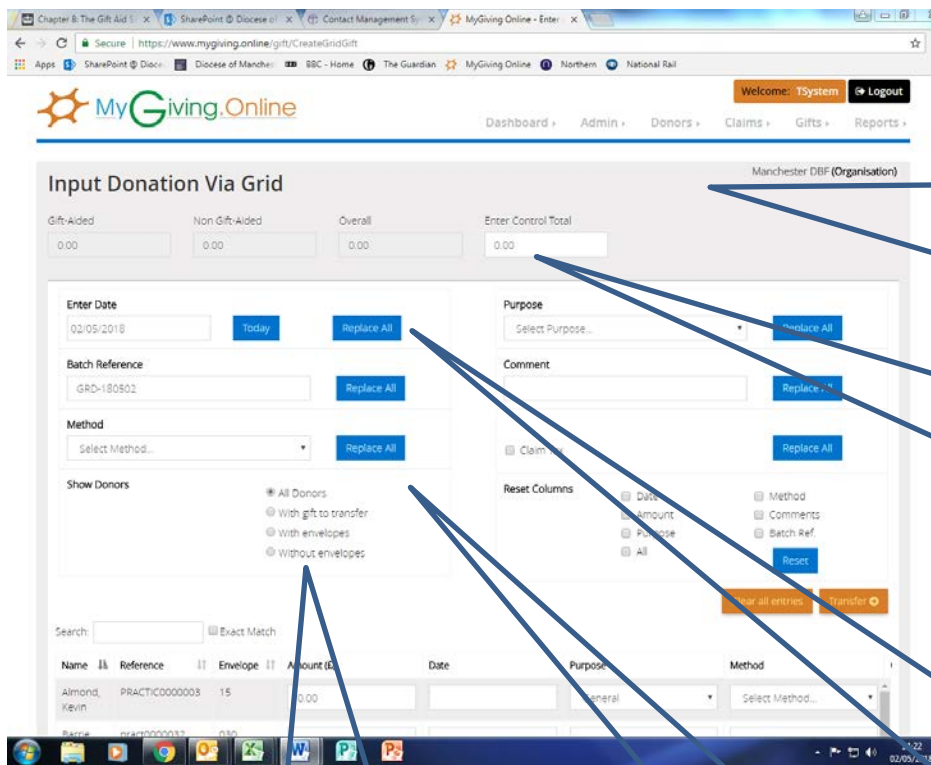
This screen will appear. Please note, this is the top of window only and you will need to scroll down to see the rest of it.

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 these options. For example, you can choose all of your envelope donors.

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

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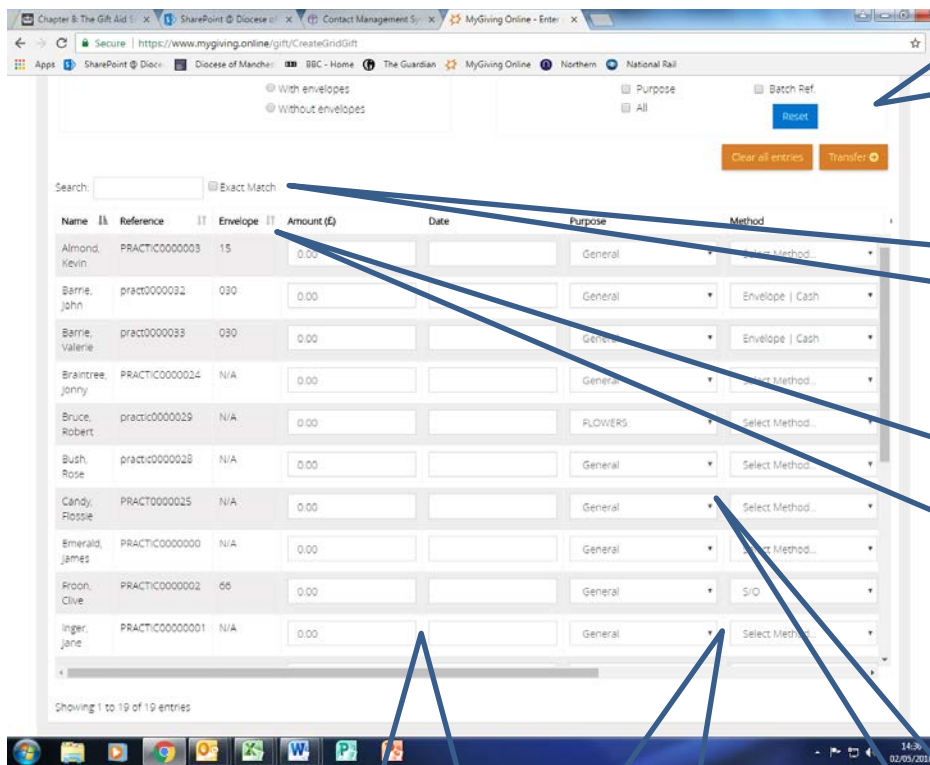
This is your screen view when you scroll to the bottom of the window.

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.

Enter in the donation amount. Enter the date(s) you wish, unless you have selected Replace All at the top of the screen.

You can choose different Purposes and Methods if you wish.

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.
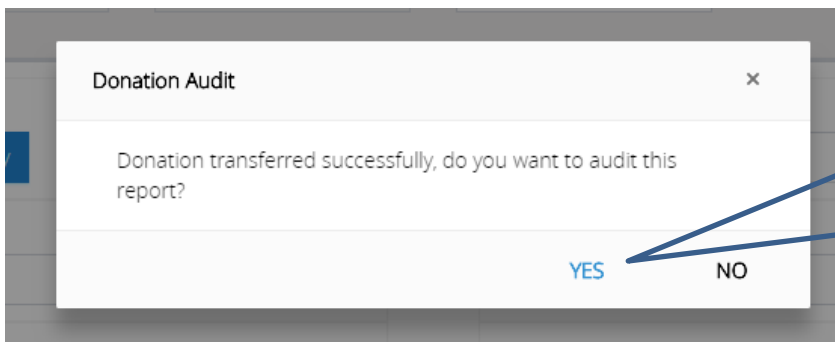
- Step 5
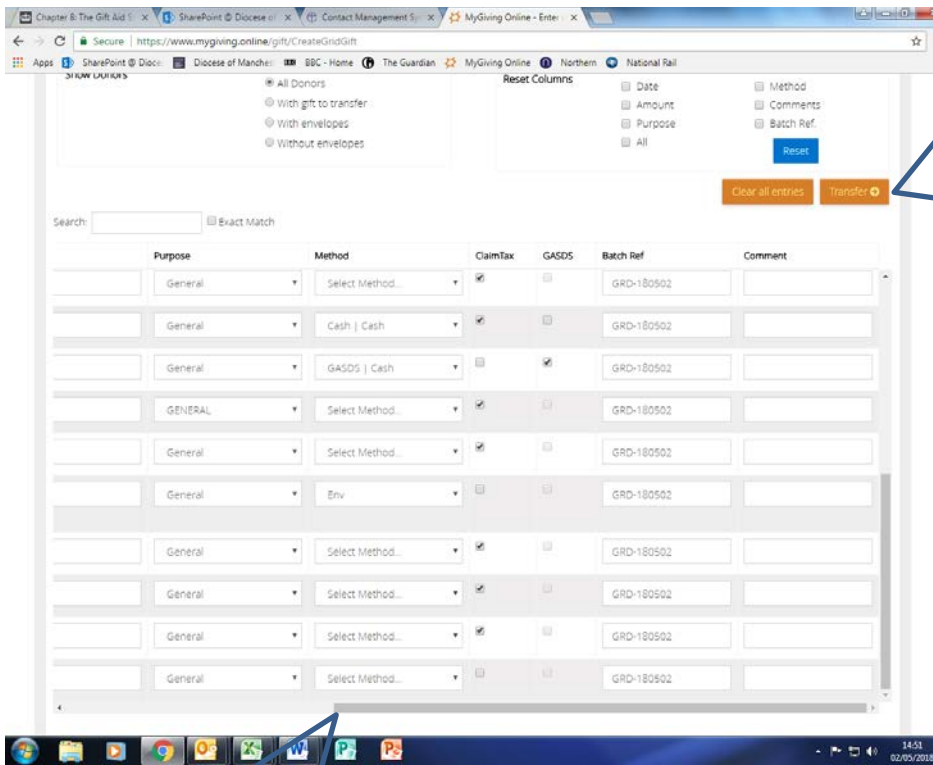
Once you have completed a final check of your donations, click on Transfer to move all the donations you have entered into the donor records.
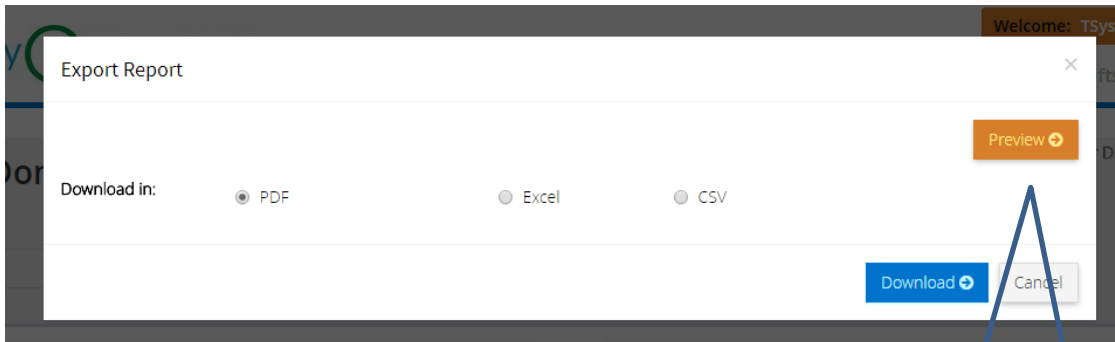
Click on the screen scroll and move it to see the other fields on the right hand side of the screen.

- 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.
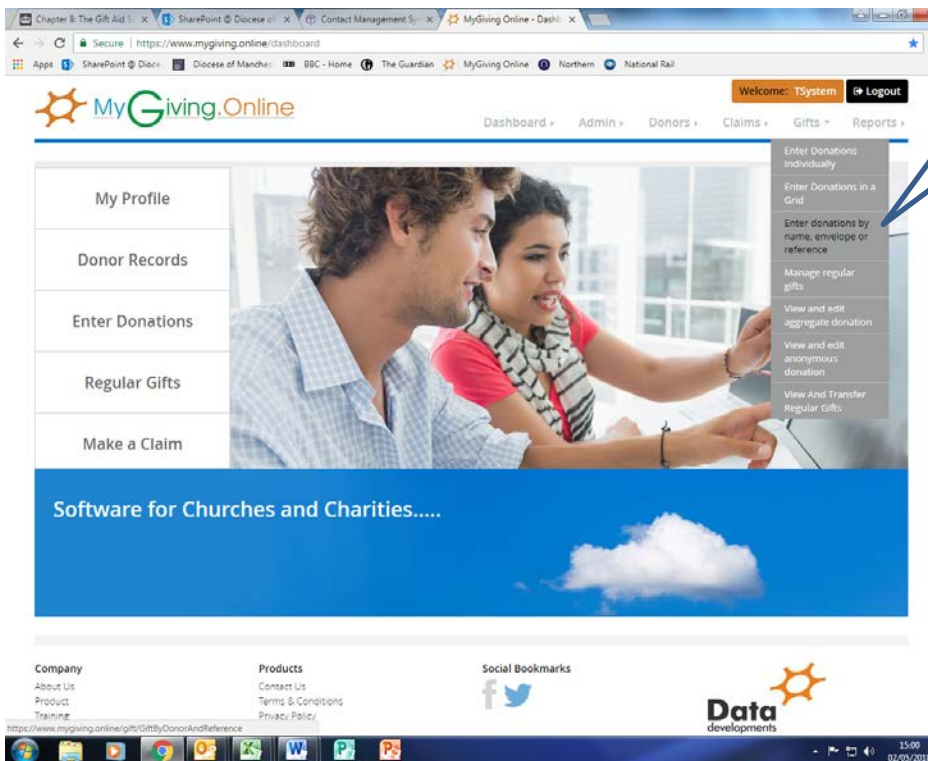
- Step 7

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.
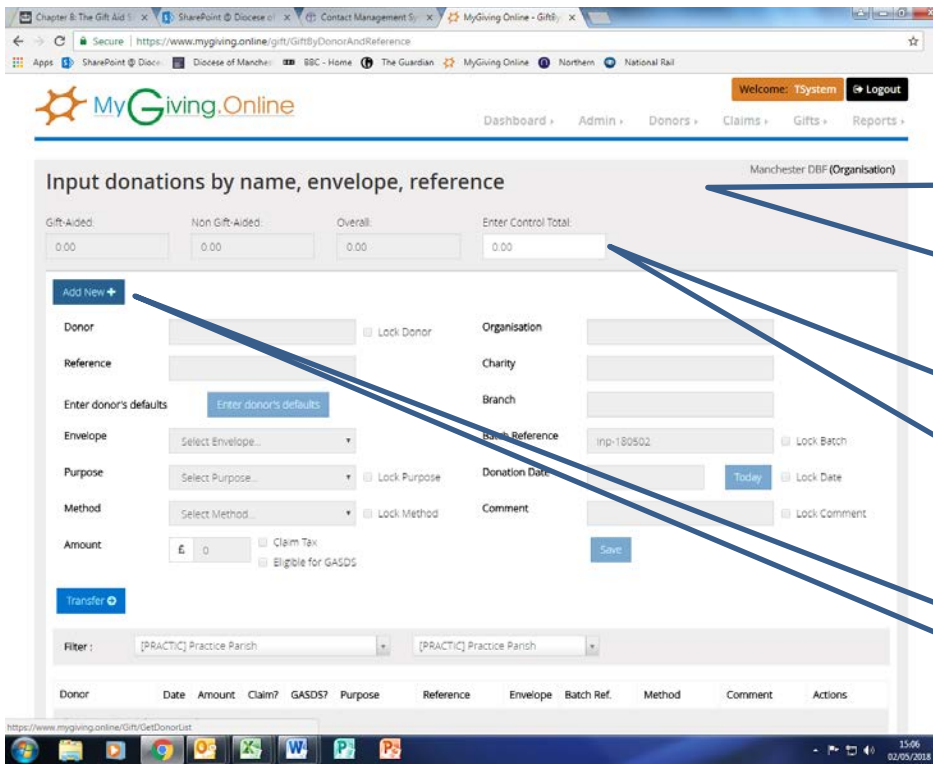
3. Entering Donations by name, envelope or reference

- Step 1

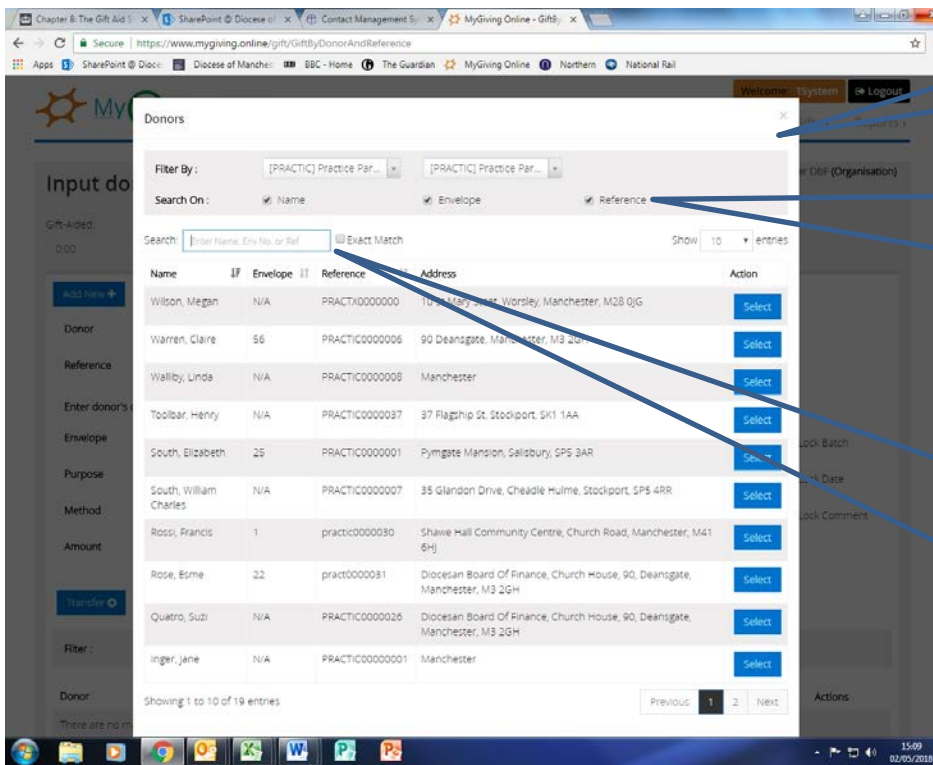Click on Gifts and Enter donations by name, envelope or reference.

- Step 2

This screen will appear. Please note, this is the top of 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.
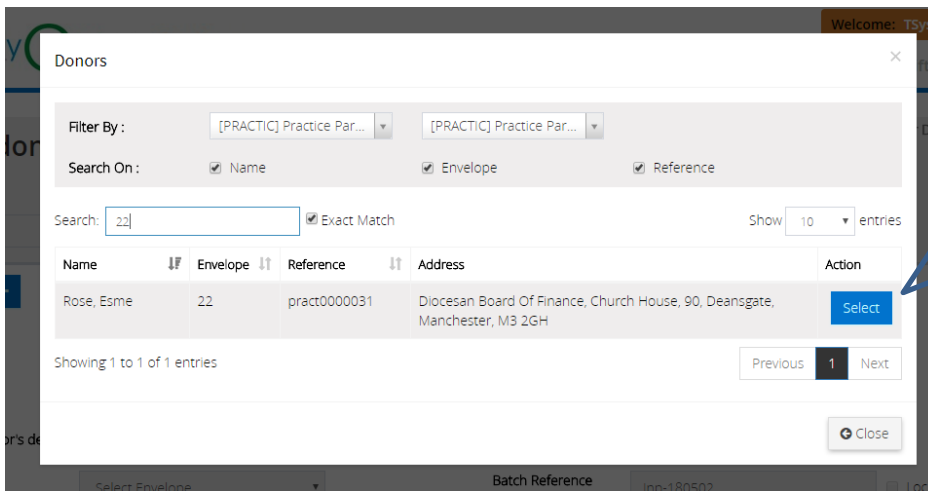
Click on Add New.
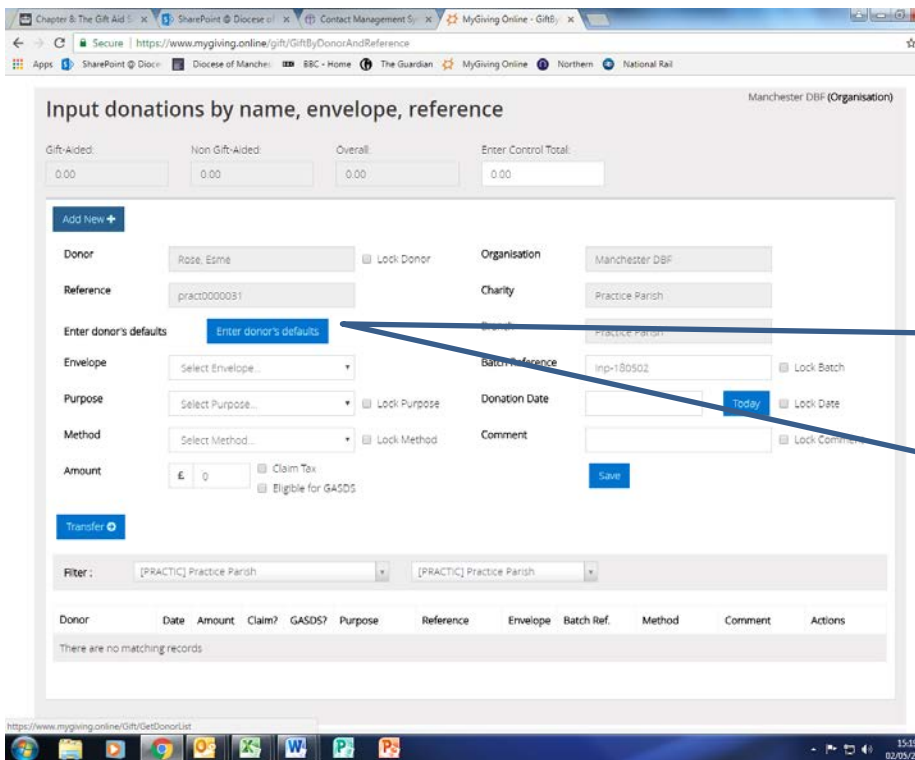
- Step 3

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.
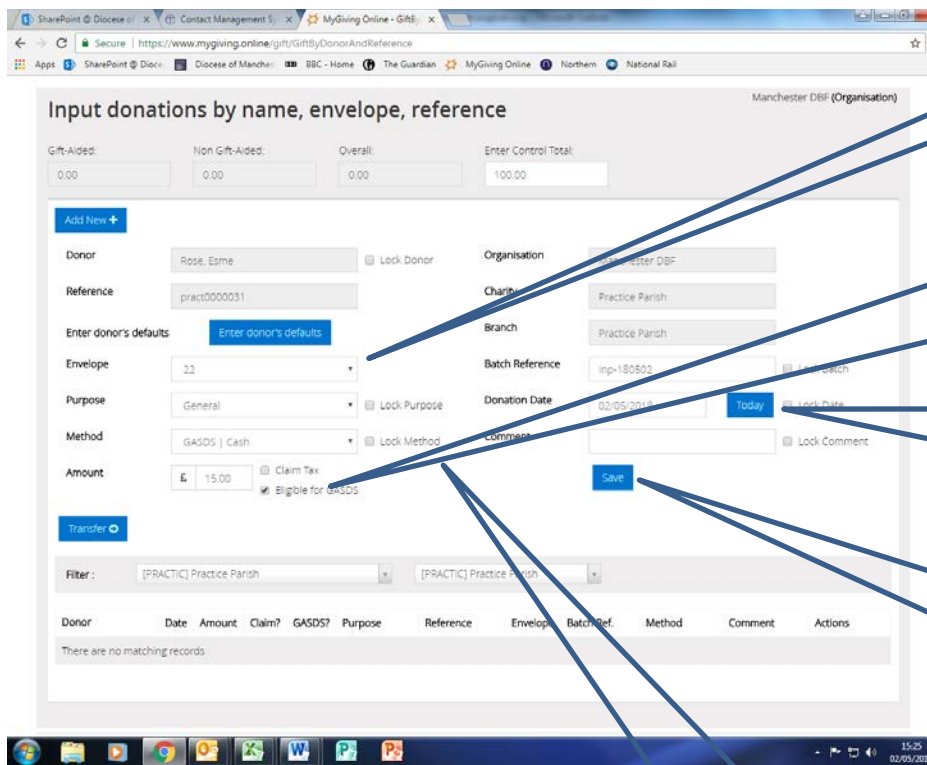
For example, I have specified Envelope 22 to produce these results. Click on select to open up the next window.

- 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

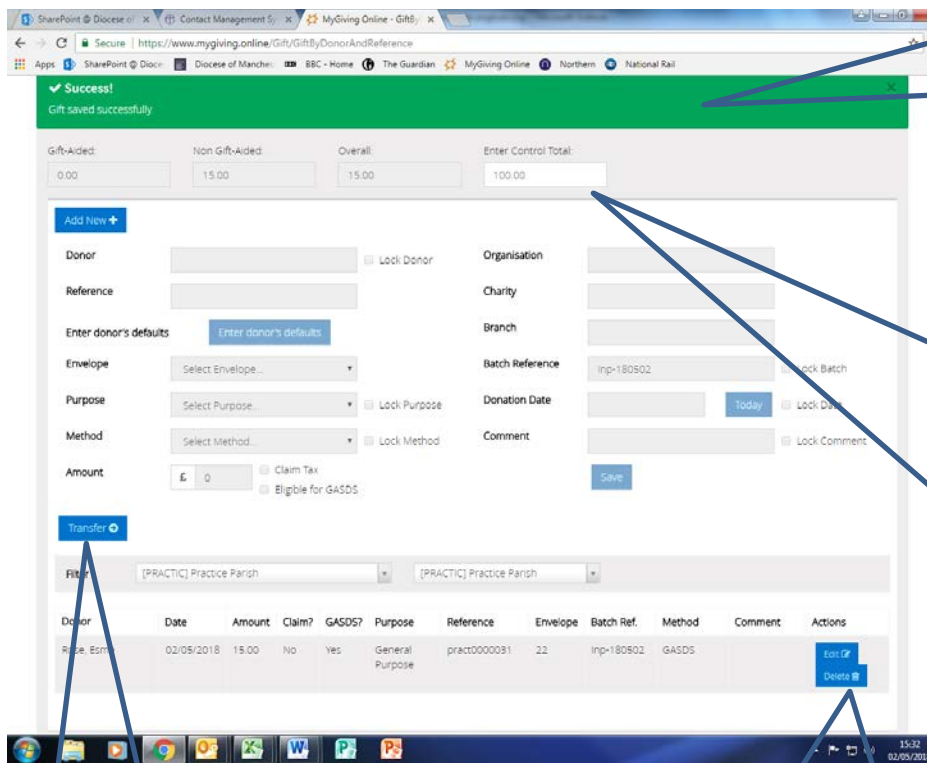The donor's defaults have now appeared.

Enter a donation amount and, as appropriate, tick Claim Tax or 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 the donations at the bottom of the screen anymore.
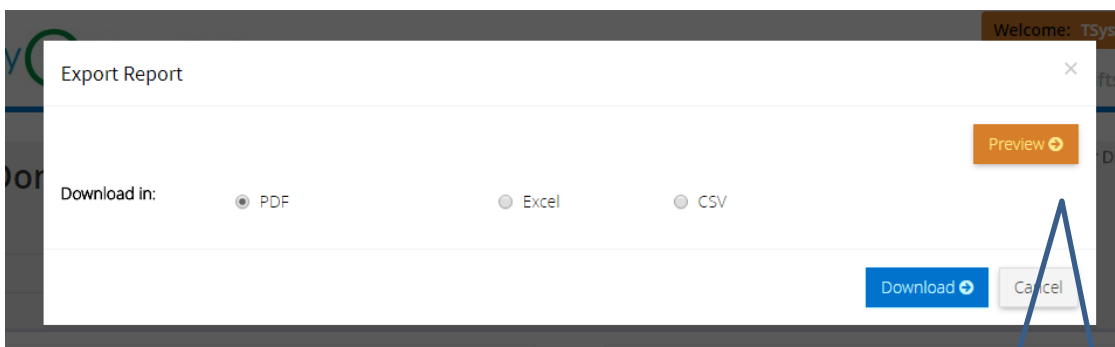
Your donations will appear at the bottom of the screen. You can still edit or delete them at this stage.

- Step 6
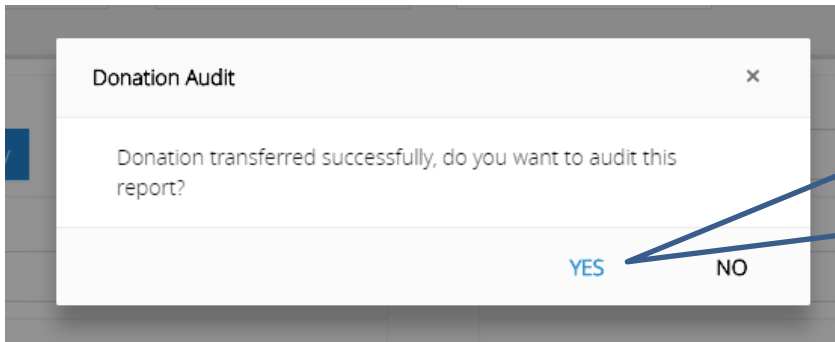
This pop up screen will appear asking if you'd like to produce an audit report, and click on Yes.
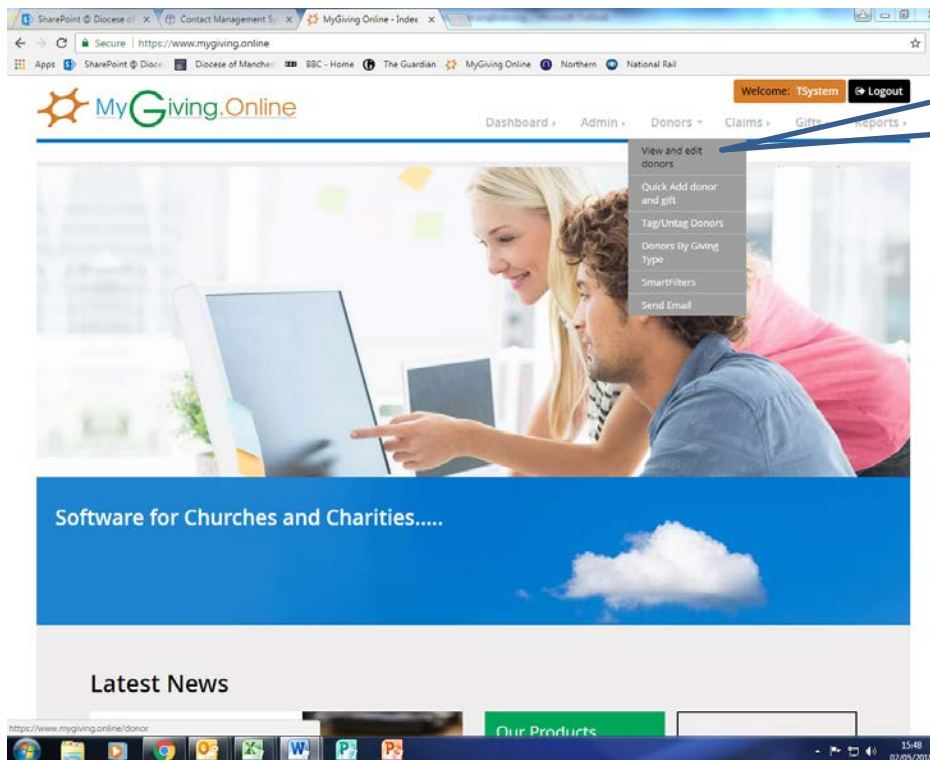
- Step 7

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.
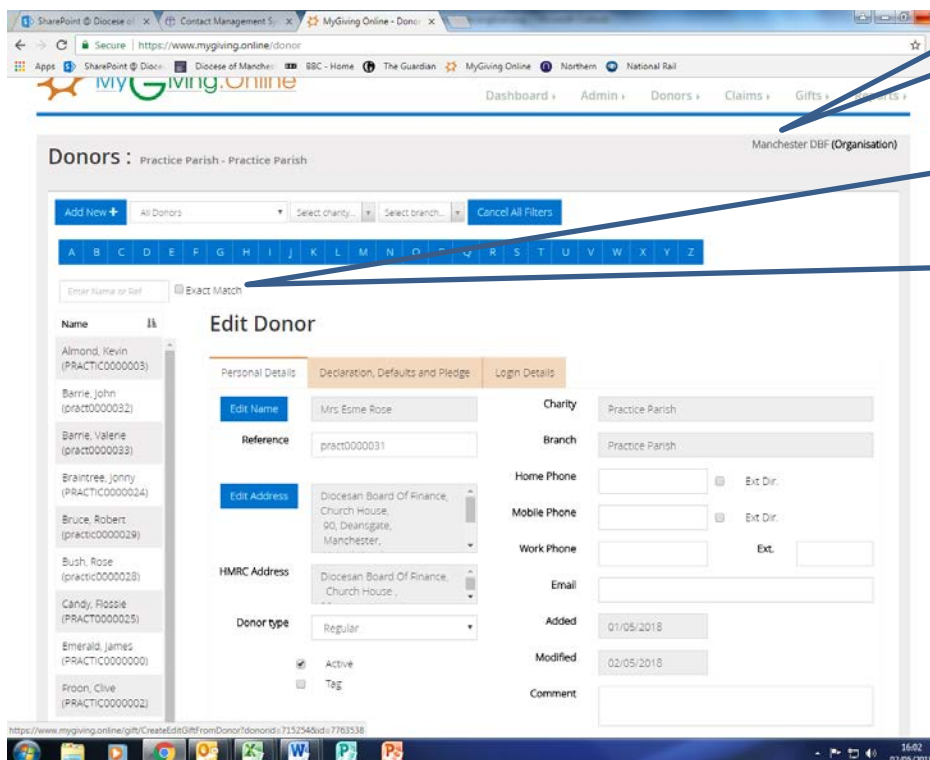
4. Entering a donation in view and edit donors
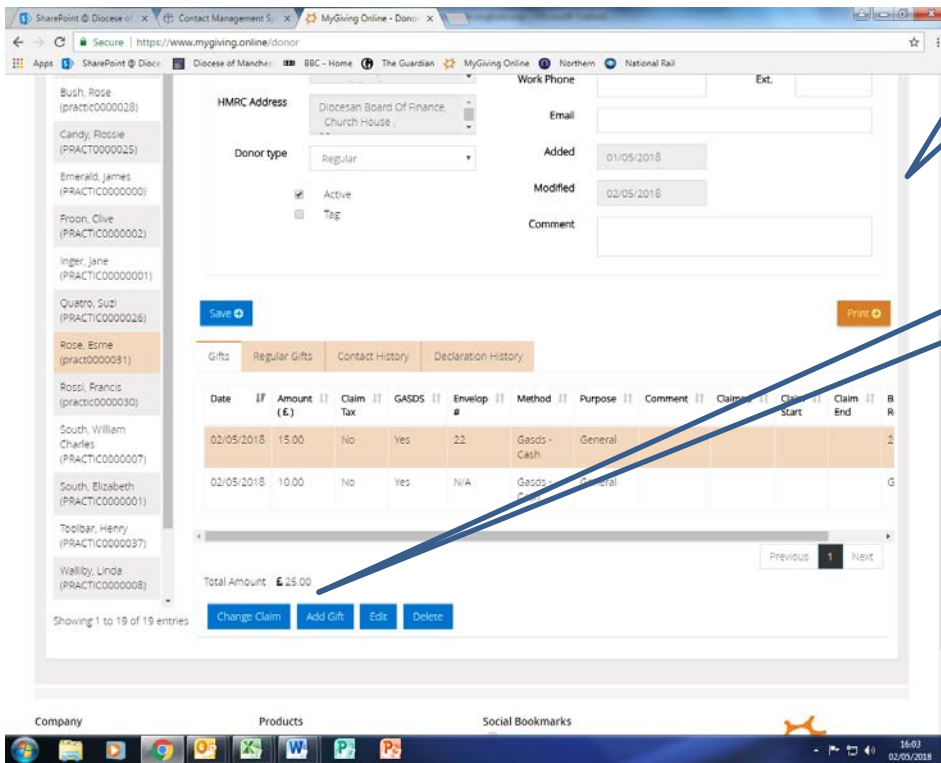
- Step 1

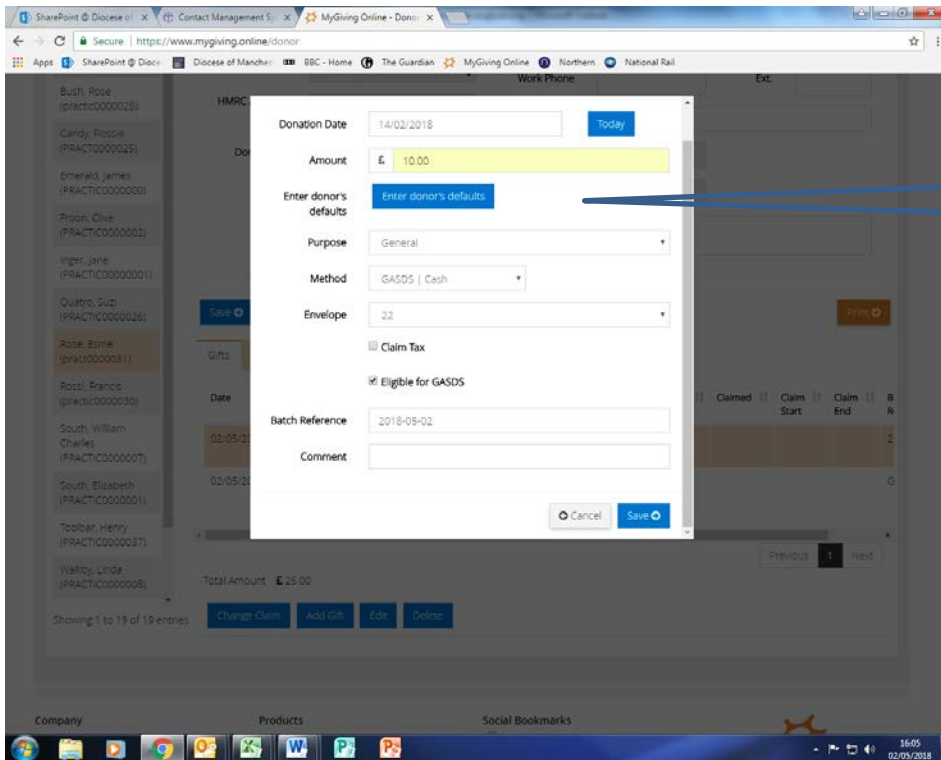Click on Donors and View and edit donors.

- Step 2

This window will open up.

You can search for a specific donor by search for a Name or Reference in the box. Alternatively, choose a name from the list of donors in the left hand column.

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

Click on Add Gift.

- Step 3

This window will pop up.

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

Enter the donation amount.

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

As appropriate, ensure the Claim Tax or 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.