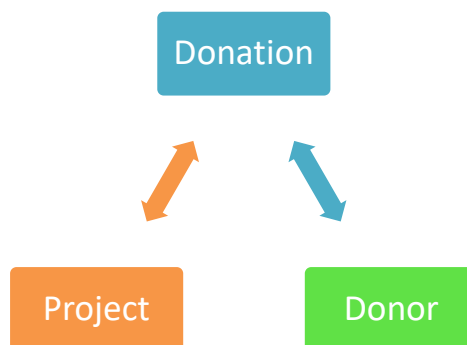


HOW IT WORKS

Capturing donation data includes recording of the donor's name, contact details, donation type, payment method, fundraising mechanism and more. The donation must be linked to a specific project and optionally to a fundraising campaign.

Once captured thanking donors for each donation and issuing tax certificates is simple with little admin. Drawing reports and viewing dashboards of donations received is all available.



DONATION EXAMPLE

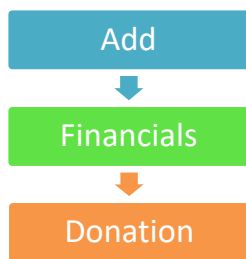
Paid from	Dlamini, Sibusiso
Paid to	Burns Unit expansion
Parent	Faculty of Health / Child Welfare
Campaign	Paraffin safety campaign
Description	Paint for waiting room
Date	05/03/2014
Amount	3 500.00
Tax certificate	<input type="checkbox"/>
Transaction number:	000102
Tax certificate number:	000113
Payment method	EFT
Fundraising mechanism	Campaign
Donation type	Money / In-kind

Paid from:	The donor organisation or person
Paid to:	The project the donation was made to
Parent:	The business unit or organisation running the project (described more fully in a separate quick guide – Projects for IA)
Campaign:	The campaign through which the donor was solicited
Description:	Free format description field
Date:	Date the donation was made
Amount:	The amount donated
Tax certificate:	If selected the donation will be available to issue a tax certificate If not selected the donation will not be available to issue a tax certificate
Transaction number:	Bank transaction number
Tax certificate number:	System generated number if donation is linked to a tax certificate issued on DevMan
Payment method:	The method the donation was received
Fundraising mechanism:	The method the donation was solicited via
Donation type:	To indicate if the donation received was monetary or in-kind

ADD A DONATION FROM DONOR PROFILE

Before adding a donation a project must be added – see quick guide for Projects for IA:

From the donors profile (person or organisation profile) select :

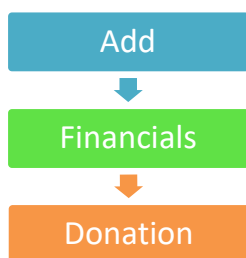


Paid from:	Data will auto fill based on the donor you are recording from
Paid to:	Use inline search to link in the specific fund raising project
Parent:	Data will auto fill based on the project selected
Tax certificate:	Check the box if you want to issue a tax certificate for this donation

Complete all details and save.

ADD A DONATION FROM PROJECT PROFILE

From the project profile select :



Paid from:	Use inline search to link in the specific donor
Paid to:	Data will auto fill based on the project you are recording from
Parent:	Data will auto fill based on the project selected
Tax certificate:	Check the box if you want to issue a tax certificate for this donation

Complete all details and save.

NOTES