The Raiser's Edge™

Gift Records Guide

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What Is In This Guide?

In the *Gift Records Guide*, you learn to add, edit, and delete gifts, adjust gift records, schedule pledges, and use matching gifts. You can also learn about the following.

- "Splitting a gift between two funds" on page 64
- "Adjusting a gift for the first time" on page 94
- "Paying a pledge for another constituent" on page 168
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- "Paying multiple matching gift pledges at the same time" on page 279

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

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Note: Certain fields, for example Social Security Number and insurance policy number, are masked and encrypted in the database for security purposes. If you see asterisks in this field, you do not have rights to view the data. For more information, consult with your System Administrator.

A gift record contains detailed information about a donation given by a specific constituent. This information includes the gift date, amount, and type; the solicitor responsible for obtaining the gift; and the campaign, fund, appeal, and package to which the gift is designated. Gift records are designed to store all information relating to a single gift in one place. Each gift donated to your organization has a separate gift record. For example, Mary Sanders donates $25 toward your 2005 Annual Fund. Later in the year, Mary decides to donate an additional $50 to the same fund. Each time you receive a gift from Mary, you need to add a new gift record to the database. Later, you can use other parts of ***The Raiser's Edge*** to create reports describing your fundraising progress. You can also create thank-you letters and receipts for the gifts you received.

This chapter introduces you to the different types of available gift records and explains how to use and enter information on a gift record. All other chapters in this manual build on the information presented in this chapter. Before reading other chapters in the *Gift Records Guide*, make sure you read and understand the information in this chapter.

After you master basic gift entry, you can learn about entering gifts in *Batch*. *Batch* is simply another way to add constituents and gifts to your database. With *Batch*, you can add and update constituent and gift records quickly because you do not need to open each individual record to add or update information. The spreadsheet format *Batch* provides makes it easy to use and has the look and feel of Microsoft *Excel*. You can also use the **Gift Barcode** field in a gift batch to scan information from phonathon cards or appeal cards. For more information about *Batch*, see the *Batch Guide*.

Frequently Used Terms

This section defines words and phrases you need to know as you work with the *Gift Records Guide* and gift records. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Acknowledge. When a constituent donates a gift, you can use the **Acknowledge** field to track whether you sent a letter thanking a constituent for his gift. In this field, you can select Acknowledged, Not Acknowledged, or Do Not Acknowledge. For example, if you handwrite a thank-you letter to a constituent, you can select Acknowledged in the **Acknowledge** field.

If you use the Donor Acknowledgement Letters mail task in *Mail* to print your acknowledgement letters, select Not Acknowledged in the **Acknowledge** field and do not enter a reference date. After you create an acknowledgement letter for this gift in *Mail*, the program can automatically update the **Acknowledge** field to Acknowledged and enter the date you printed the letters. When you select Acknowledged or Do Not Acknowledge, *Mail* does not create an acknowledgement letter for the gift. For more information about creating acknowledgement letters in *Mail*, see the *Mail Guide*.

Adjustment record. An adjustment record is a record you create to track any changes made to the gift amount and funds to which the gift is designated. This includes reversing a gift. Adjustment records are posted to the ***General Ledger*** so you can maintain a record of any changes to the gift amount or the distribution of incoming funds. If an adjustment has not been posted to the ***General Ledger***, it is referred to as Pending. Only one pending adjustment can exist for each gift record. After posting a pending adjustment to the ***General Ledger***, you can make another adjustment to the gift record.

Appeal. An appeal is a solicitation that brings in your gifts. Appeals can include auctions, direct mailings, and phonathons. Because some of your gifts can be unsolicited, you do not have to associate an appeal with every gift. You can set goals for your appeals and run reports showing how close you are to reaching those goals. Additionally, you can create packages to track historic and statistical information for different facets of an appeal on the Package tab of an appeal record.

Benefits. Membership benefits are gifts your organization gives to constituents, depending on the level of membership they agree to join or the dues they decide to pay. For example, when a constituent donates a gift to your organization, you may want to give certain benefits, such as a free shirt or newsletter, as thanks for the donation. You can itemize the benefits a constituent receives and calculate the total cost of these benefits to your organization. For example, when you give a T-Shirt and two Membership Pins to a donor, the cost to your organization may be $21.

Campaign. A campaign is your overall objective for raising money. For example, a museum can have a New Building Campaign with the objective of raising money for a new facility. Of campaigns, funds, and appeals, campaigns are the broadest type of record. Campaigns act as an umbrella over funds and appeals.

A single campaign can have any number of funds and appeals under it. For example, the museum can have both a Moving Fund and a Computer Equipment Fund under the New Building Campaign. The overall objective is to raise money for the new building. Within this objective, gifts to the specific funds go toward covering expenses for moving and toward purchasing computer equipment to use in the new building. Another example is a Disaster Relief Campaign for the National Red Cross. Within the overall objective of raising funds to assist victims of all types of disasters, the National Red Cross can have a Flood Relief Fund and the somewhat broader General Relief Fund. If your organization has many designated purposes for gifts, you can have numerous funds with only a few campaigns.

Constituent code. A constituent code identifies why a constituent is in your database. Perhaps he is a friend, board member, trustee, or volunteer. On the Miscellaneous tab of a gift record, in the **Constituency** field, you can select a constituent code to explain why the constituent gave a gift. When you click the arrow in the **Constituency** field, the program displays a list of all the constituent codes entered on the Bio 2 tab or Org 2 tab of the donor's constituent record. For example, Board member and Volunteer are the constituent codes listed on an individual's Bio 2 tab. When this constituent donates a gift, you can track in the **Constituency** field, whether the gift was given because of the constituent's Board Member status or Volunteer status. We strongly recommend you add a constituent code to every gift in the database to track why gifts are given to your organization.

Fund. A fund identifies where you should record gifts and pledges for financial purposes. Funds are key to managing your gifts. Because funds are so closely linked with gifts, the **Fund** field is required when you enter gifts. On the fund record, you can specify the bank or financial accounts to which you want gifts associated with the fund to apply.

Gift code. Enter a **Gift code** to track various characteristics about a gift. For example, if your organization recognizes certain constituents for their gifts by placing their names on a plaque, you can add a gift code of "Donor Wall" to gifts that meet the requirements. Because you are tracking whether a constituent should be included on the donor wall, you can use this information to create a query or a mailing for individuals who qualify for the donor wall.

Gift ID. A **Gift ID** is a unique number you can assign to each gift in the database. The **Gift ID** can contain both alphabetical and numerical characters and can have a maximum length of 50 characters. ***The Raiser's Edge*** can automatically create a **Gift ID** when you save the gift record.

Gift record. A gift record contains detailed information about a donation given by a specific constituent. This information includes the gift date, amount, and type; the solicitor responsible for obtaining the gift; and the campaign, fund, appeal, and package to which the gift is designated. Gift records are designed to hold all information relating to a single gift in one place. Each gift donated to your organization has a separate gift record.

Gift subtype. A **Gift subtype** is a way you can further define your gifts. For example, if your organization receives frequent donations of computers, you can select Gift-in-Kind in the **Gift type** field and enter a **Gift subtype** of Computers.

The **Gift subtype** field can be used to define a GL Distribution. The GL Distribution is the financial account numbers associated with the **Gift type**, **Gift subtype**, and **Fund** you select on a gift record. For example, you can specify all gifts with a subtype of Computers to be allocated to your Education fund.

Gift type. When entering a gift into ***The Raiser's Edge***, you must enter a gift type based on the nature of the gift. For example, Sidney Prescott donates 10 computers to your organization. Because a donation of computers is a form of a gift-in-kind, enter Gift-in-Kind in the **Gift type** field of the gift record. Gift types are classified as Cash, Pledge, Gift-in-Kind, Stock/Property, Other, Recurring Gift, and Planned Gift (if you have the optional module *PlannedGiftTracker*).

Package. A package gives you the ability to track and analyze the profitability of different solicitations within a single appeal. For example, if you have a Summer Phonathon in which low-level donors are called with a prerecorded message while major donors are contacted personally, you can create a separate package for each. By doing so, you can run and break down your summaries to pinpoint the effectiveness and expense of each type of call, instead of running a single summary for the entire phonathon. Packages let you analyze the effectiveness of your appeals in a precise manner. Packages can be analyzed during or after an appeal.

Receipt. A receipt is a written or printed statement acknowledging that goods or money have been received. When a constituent donates a gift, you can use the **Receipt** field on a gift record to track whether you sent a receipt for a gift. In the **Receipt** field, you can select Receipted, Not Receipted, or Do Not Receipt. In the field to the right of the **Receipt** field, enter a reference date, such as the date you print the receipt. For example, if you handwrite a receipt for a gift, you can select Receipted in the **Receipt** field and enter the date you sent the receipt to the donor in the date field.

If you use the Receipts mail task to print the receipts, you can select Not Receipted in the **Receipt** field and not enter a reference date. After you create a receipt for the gift in *Mail*, the program can automatically update the **Receipt** field to Receipted and enter the date you print the receipt. When you select Receipted or Do Not Receipt in the **Receipt** field, *Mail* does not create a receipt for this gift.

Reference. In the **Reference** field on a gift record, you can enter up to 255 characters of free-form text information about a gift. For example, you can add "Gift donated to support volunteer dinner." You can also enter information about stock gifts, such as "40 shares of XYZ Company".

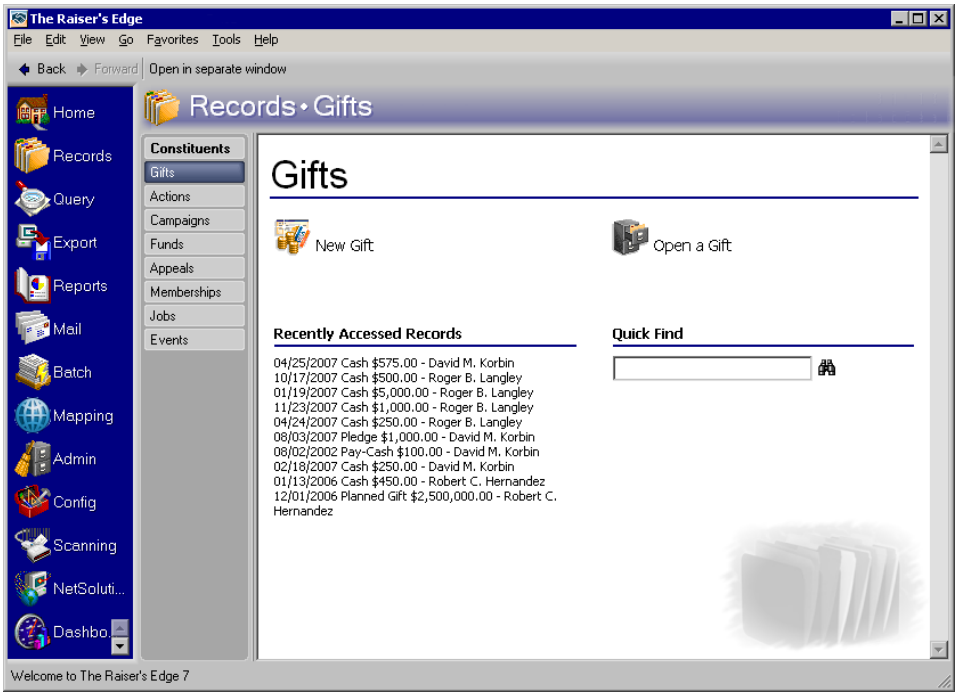
When you create certain types of gift records, the program automatically inserts information when the **Reference** field is blank. For example, when you apply a cash gift record to a pledge, "Ins of 02/05/2006" appears in the **Reference** field on the cash gift record. This message indicates the gift record is applied to the pledge installment due on 02/05/2006.

Soft credit. A soft credit allows more than one constituent to share credit for a single gift without adding duplicate gift records to the database. On reports and mailings, you determine whether the donor, the soft credit recipient, or both should receive credit for the gift. When you soft credit constituents for a gift, you can decide whether to split the credit evenly among all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution. You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in your database. A single constituent cannot be soft credited with an amount greater than the gift amount.

Solicitor. A solicitor is a member of your organization assigned to seek donations from constituents. Solicitors play a vital role in your fundraising efforts. Your solicitors can have duties ranging from calling, visiting, and dining with prospective donors, to organizing campaigns and funds. In ***The Raiser's Edge***, your solicitors must be entered in the database as constituents.

Navigating in Gifts

From the Gifts page, you can create new gift records for the gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Other, and Planned Gift (if you use the optional module *PlannedGiftTracker*). You can also open existing gift records in the database. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

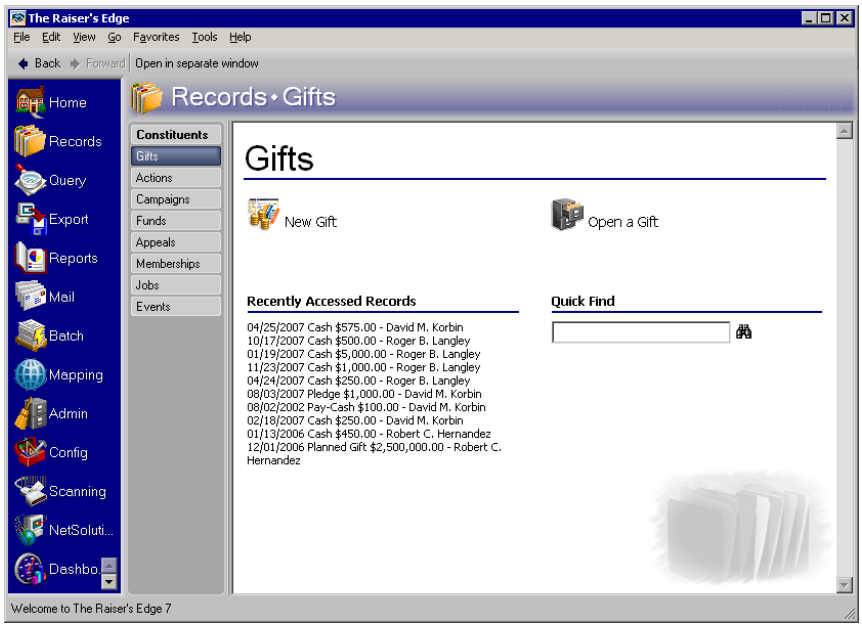
Accessing a Gift Record

Once you add a gift record to the database, you can open the record from the Records page or the donor's constituent record. You may need to open a gift record to view information entered on the record or add additional notes about the gift. This section explains both ways to open a gift record.

- **Opening an existing gift record from the Records page**
  1. On the Raiser's Edge bar, click **Records**.

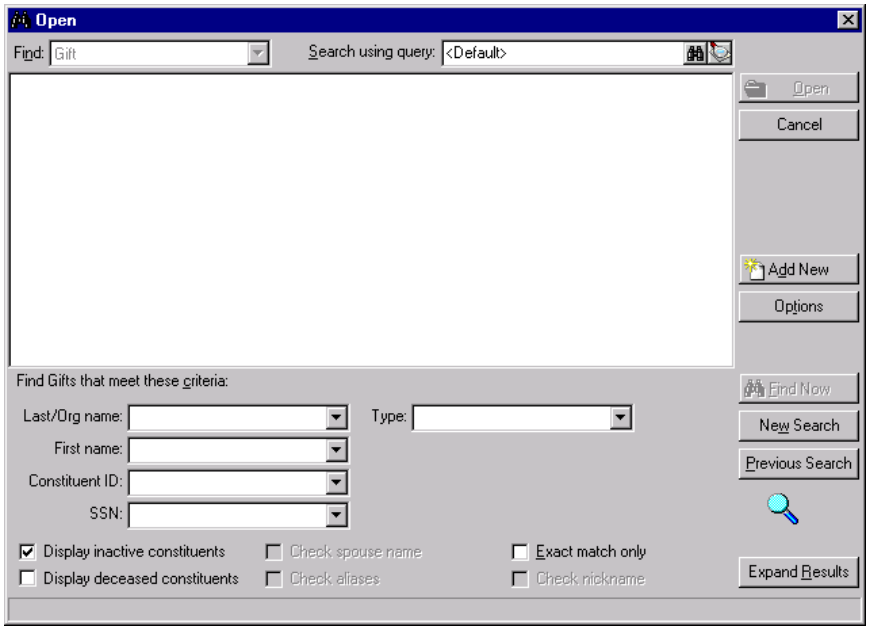
Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

2. Click the **Gifts** link. The Gifts page appears.



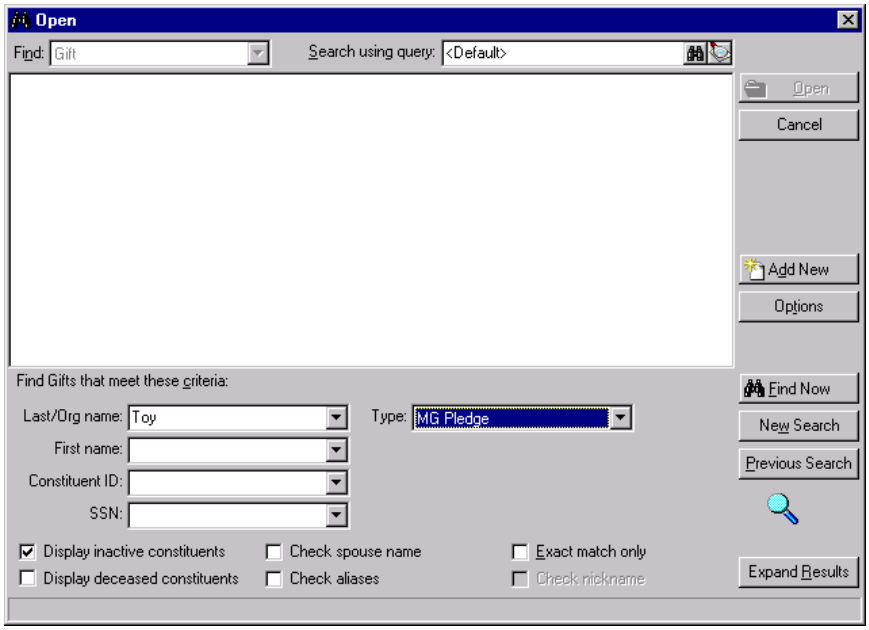
Note: All the fields, checkboxes, and buttons on the Open screen are discussed in detail in the *Program Basics Guide*.

3. Click **Open a Gift**. The Open screen appears so you can search for the gift record you want to open.



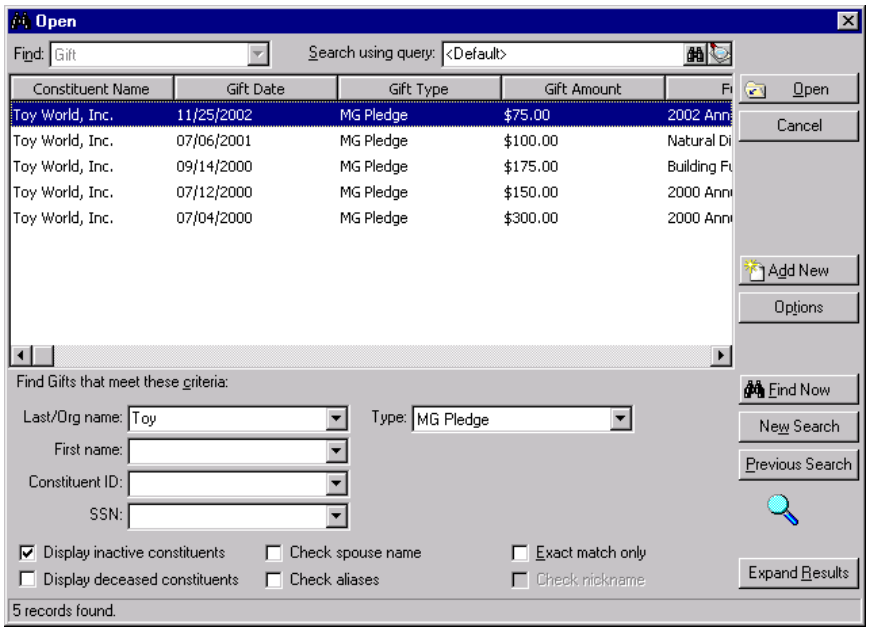
Note: In the **Find Gifts that meet these criteria** frame, you can enter the first few letters or characters in the criteria fields if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

4. In the **Find Gifts that meet these criteria** frame, decide what criteria you want to use to search for the gift and enter the information in the appropriate fields. You can search by an individual's first or last name, organization name, constituent ID, Social Security Number, and gift type.



Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Adding too much criteria information in the **Find Gifts that meet these criteria** frame can actually prevent you from finding a gift.

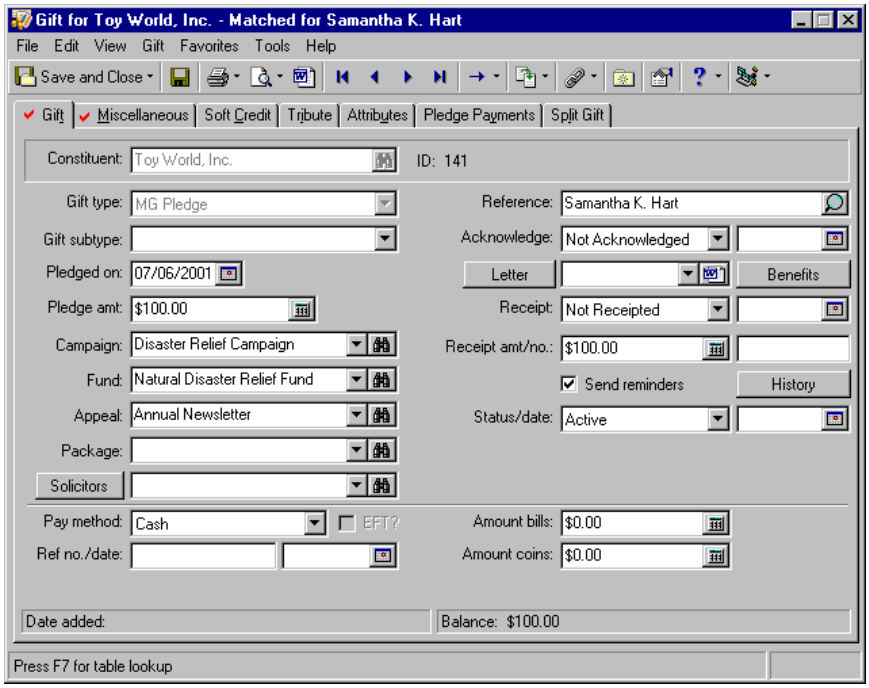
5. Click **Find Now**. If the search criteria you entered matches a gift in the database, the gift lists in the grid. More than one gift may appear if the criteria you entered matches multiple gifts.



6. In the grid, select the gift record you want to open.

Note: If the gift has been posted to Blackbaud's ***General Ledger***, all fields on the gift record are disabled. You can change the information on the gift record using the **Adjust** option. For more information, see "Adjusting a Gift" on page 91.

7. Click **Open**. The gift record appears.



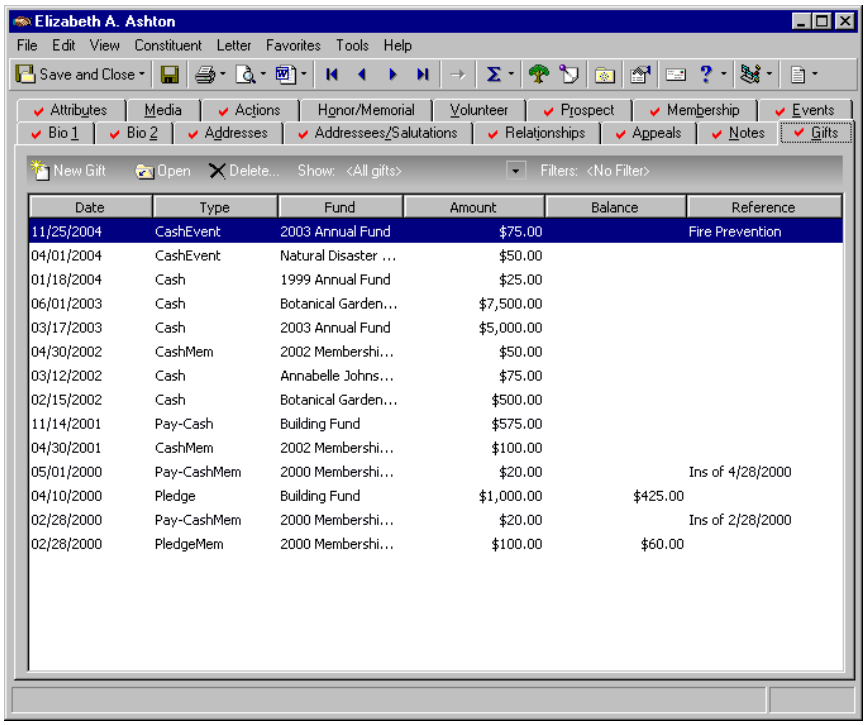
Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

8. After you enter or edit the appropriate information, click **Save and Close** on the toolbar to save your changes and close the gift record.

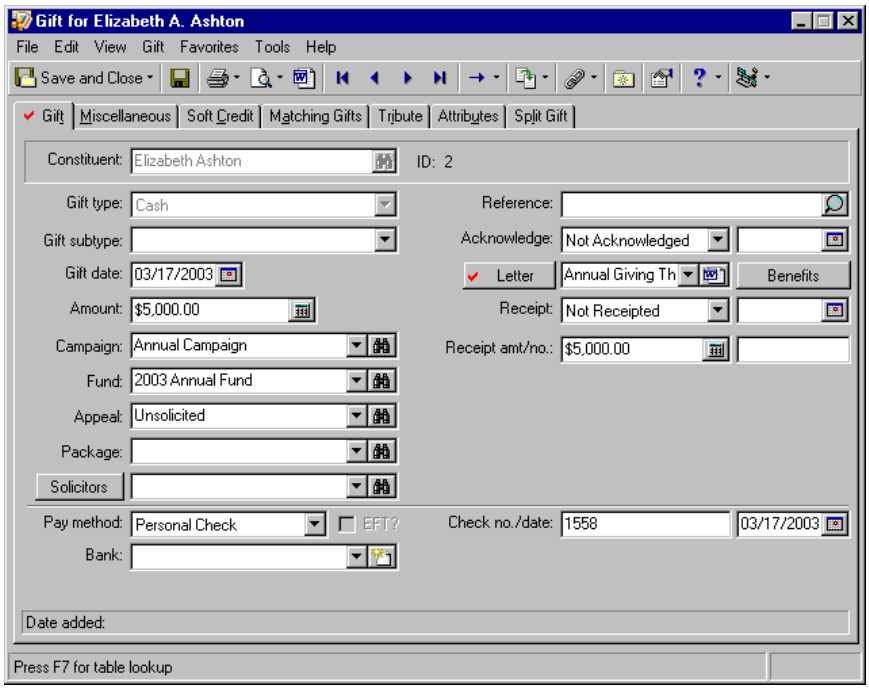
Opening an existing gift record from the donor's constituent record

1. Open the constituent record for the donor of the gift. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

2. Select the Gifts tab.



3. In the grid, select the gift record you want to open.
4. Click **Open** on the action bar. The gift record appears.



5. After you enter or edit the appropriate information, click **Save and Close** on the toolbar to save your changes and close the gift record.

Gift Record Toolbar

The toolbar contains buttons representing common commands for a gift record. You can use these buttons as alternatives to menu commands to save time during data entry.

Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the gift record

Print a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record

Preview a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record

Execute a *Word* merge in *Mail*

Go to the first gift listed on the donor's constituent record

Go to the previous gift listed on the donor's constituent record

Go to the next gift listed on the donor's constituent record

Go to the last gift listed on the donor's constituent record

Go to the records associated with the current gift record

Note: If you use the optional modules *Membership Management*, *Event Management*, or *Prospect Research Management*, you can link a gift to a membership, event, or proposal record, respectively.

Apply the gift record to a pledge or recurring gift

Link the gift record to a membership, event, or proposal

Add this gift record to your favorites list

Open the Gift Properties screen

Access help contents

Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you use the optional module *VBA for Advanced Customization*.

User Options

User options are preferences you set that affect how ***The Raiser's Edge*** looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of ***The Raiser's Edge***. The Options screen appears so you can establish certain user options that apply to gift records. For more information about user options, see the User Options chapter of the *Program Basics Guide*.

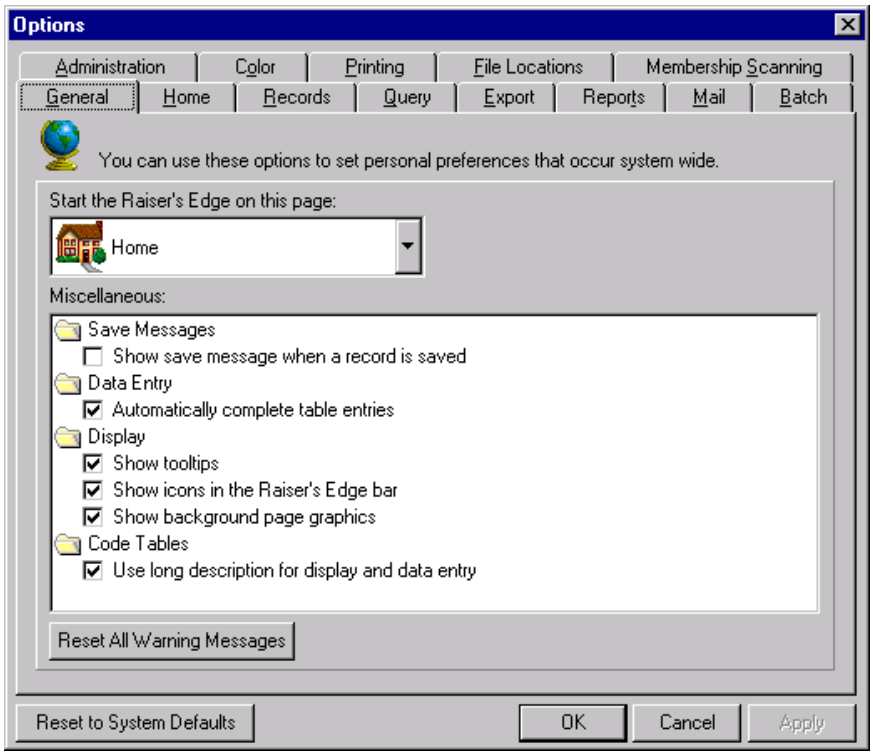
- **Defining user options**

  This procedure explains how to define user options specific to gift records. For complete information about user options, see the User Options chapter of the *Program Basics Guide*.

Note: You can also establish user options by selecting **Tools**, **User Options** from the menu bar of a gift or constituent record

1. From the menu bar of the Shell for ***The Raiser's Edge***, select **Tools**, **User Options**.

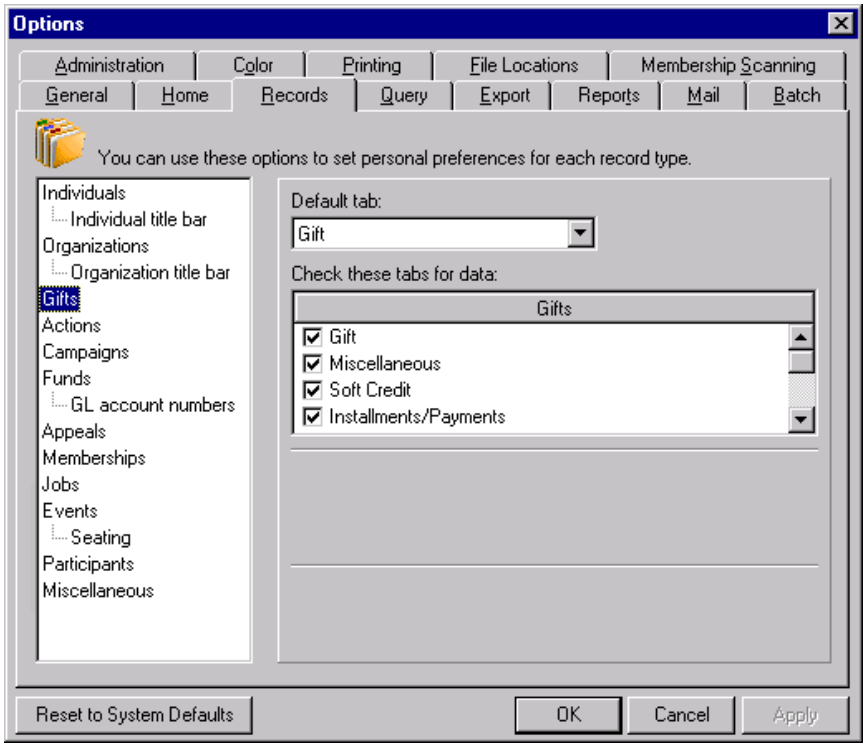
2. From the Options screen, select the General tab.



Tip: To save time, you can right-click and **Deselect All** or **Select All** the checkboxes.

3. The General tab contains user options that affect many aspects of ***The Raiser's Edge***. In the **Miscellaneous** box, select whether you want a message to appear when you save a record and whether the program displays a description or ID in code tables.
4. Select the Records tab.

5. On the Records tab, select **Gifts** from the tree view on the left side of the screen. Options for gift records appear on the right side of the screen.



6. In the **Default tab** field, select the tab that first appears when you open a gift record. For example, if you want the Gift tab to appear when you open a gift record, select Gift tab in the **Default tab** field.
7. In the **Check these tabs for data** box, mark the checkboxes next to the tabs you want the program to search for data. When the program finds data on these tabs, it places a red check mark on the tab so you know data has been entered on that tab.
8. Click **OK** to save your changes to user options.

Gift Business Rules

Business rules are preferences that affect how ***The Raiser's Edge*** works on all workstations. Many business rules affect gift records. For example, you can set a business rule to receive a message when you add a gift for a constituent who has a pledge with an outstanding balance so you can apply that gift to the pledge. Gift business rules are divided into two sections: **General options** and **Activity options**.

In **General options**, you can define rules to determine who is credited for matching gifts and soft credits on reports and in mailings, queries, and exports.

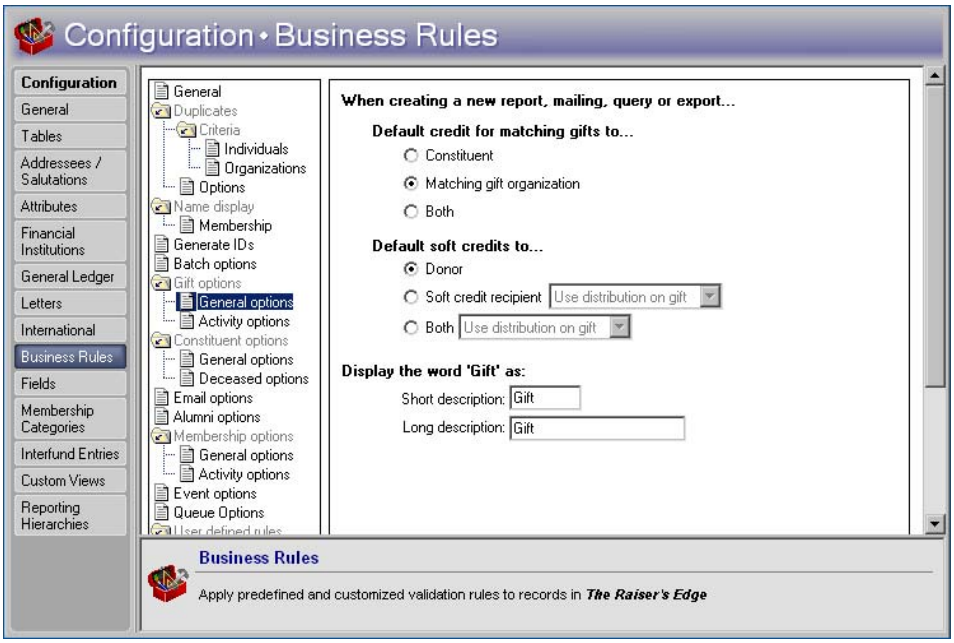
Hands-on experience is the best way to learn, so we encourage you to practice the Display the word "Gift" as business rule with your sample database.

Also, you have the option to change the word "gift" in the program. If your organization does not use the term "gift," you can customize it to reflect your business needs. The name you enter appears in the program where the term "gift" currently appears. The term "gift" does not change in all areas of ***The Raiser's Edge*** when you edit this business rule. The following terms and areas do not change.

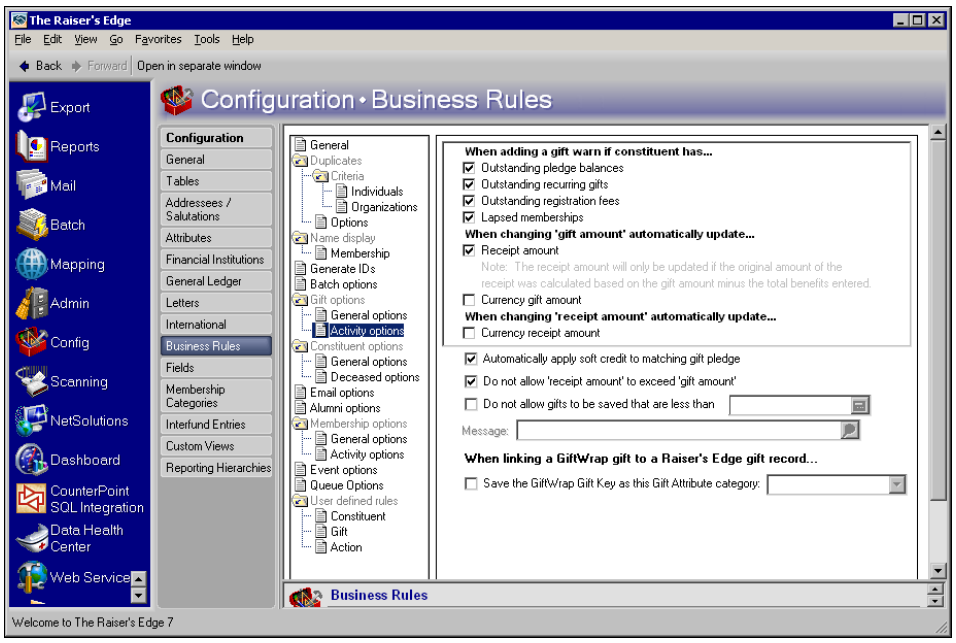
- Gift-in-Kind
- Planned Gift

- Gift of Membership
- In *Dashboard*, the Giving Summary by Constituency and Giving Clubs panels
- Existing queries, exports, reports, batches, and custom views
- In *Configuration*, **General Ledger**, the GL Distributions screen
- *Data Health Center*
- *Web Services*
- *NetSolutions*
- **Blackbaud NetCommunity**
- *Electronic Funds Transfer*
- The object name in *API*
- Workplace Giving
- The User Guides
- The Help Topics

For more information about changing the word gift, see the Configuration chapter of the *Configuration and Security Guide*.



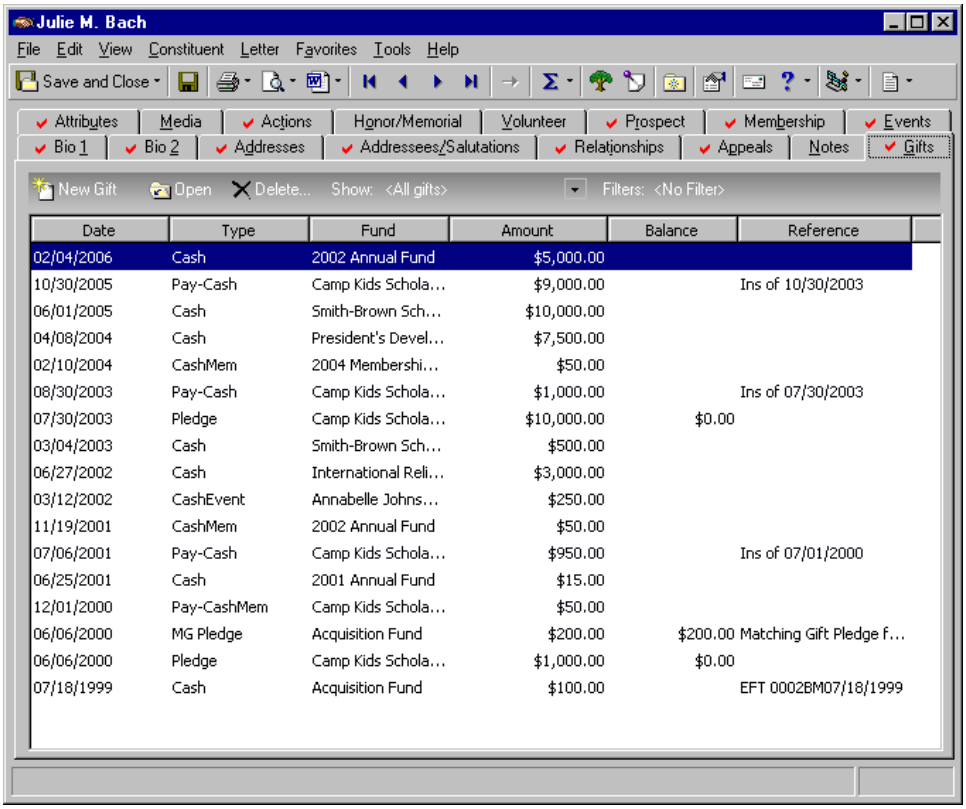
In **Activity options**, you can establish rules for warnings to appear when users add new gifts and change gift and receipt amounts. You can also establish rules for soft crediting matching gift pledges, linking matching gifts to proposals, matching gift and receipts amounts, and minimum gift amounts you allow to be saved. In addition, if you have the optional module *PlannedGiftTracker* and integrate with *GiftWrap*, you must select the gift attribute for which you want the *GiftWrap* Gift Key to save as before you link *GiftWrap* gifts to ***Raiser's Edge*** planned gifts. For more information, see the *Planned Gift Tracking Guide*.



For more information about gift business rules in ***The Raiser's Edge***, see the Configuration chapter of the *Configuration & Security Guide*.

Gifts Tab on a Constituent Record

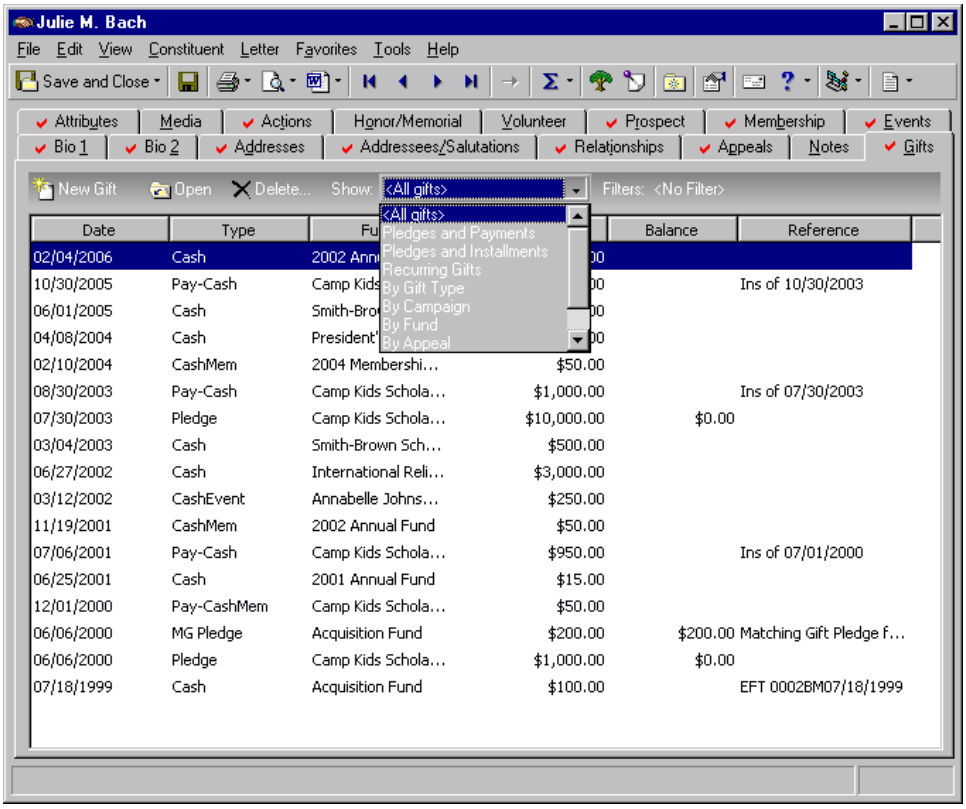
When you select the Gifts tab on a constituent record, you can view all gifts donated by that constituent. For example, when you open Julie Bach's constituent record and select the Gifts tab, you can view all the gifts she donated to your organization.



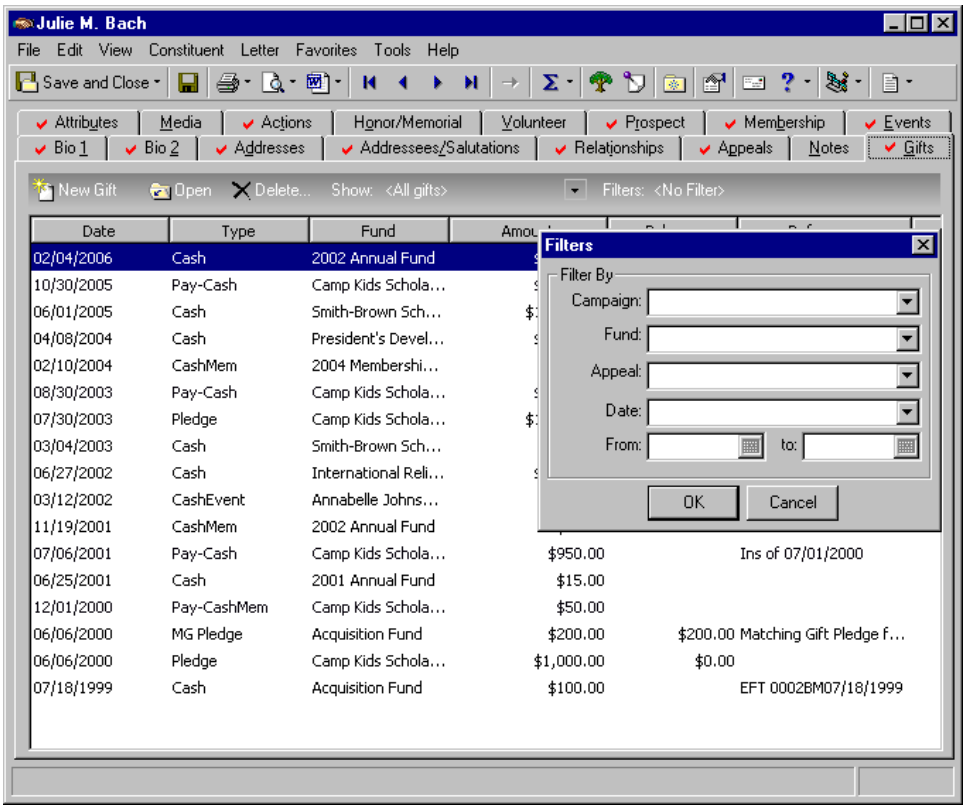
Date	Type	Fund	Amount	Balance	Reference
02/04/2006	Cash	2002 Annual Fund	$5,000.00		
10/30/2005	Pay-Cash	Camp Kids Schola...	$9,000.00		Ins of 10/30/2003
06/01/2005	Cash	Smith-Brown Sch...	$10,000.00		
04/08/2004	Cash	President's Devel...	$7,500.00		
02/10/2004	CashMem	2004 Membershi...	$50.00		
08/30/2003	Pay-Cash	Camp Kids Schola...	$1,000.00		Ins of 07/30/2003
07/30/2003	Pledge	Camp Kids Schola...	$10,000.00	$0.00	
03/04/2003	Cash	Smith-Brown Sch...	$500.00		
06/27/2002	Cash	International Reli...	$3,000.00		
03/12/2002	CashEvent	Annabelle Johns...	$250.00		
11/19/2001	CashMem	2002 Annual Fund	$50.00		
07/06/2001	Pay-Cash	Camp Kids Schola...	$950.00		Ins of 07/01/2000
06/25/2001	Cash	2001 Annual Fund	$15.00		
12/01/2000	Pay-CashMem	Camp Kids Schola...	$50.00		
06/06/2000	MG Pledge	Acquisition Fund	$200.00	$200.00	Matching Gift Pledge f...
06/06/2000	Pledge	Camp Kids Schola...	$1,000.00	$0.00	
07/18/1999	Cash	Acquisition Fund	$100.00		EFT 0002BM07/18/1999

The Gifts grid displays the **Date**, **Type**, **Fund**, **Amount**, and **Reference** for each gift donated by the constituent. If the gift is a pledge, the program also displays the remaining **Balance** due. From the action bar, you can add a new gift, open or delete an existing gift in the grid, or sort the items in the Gifts grid if you have security rights.

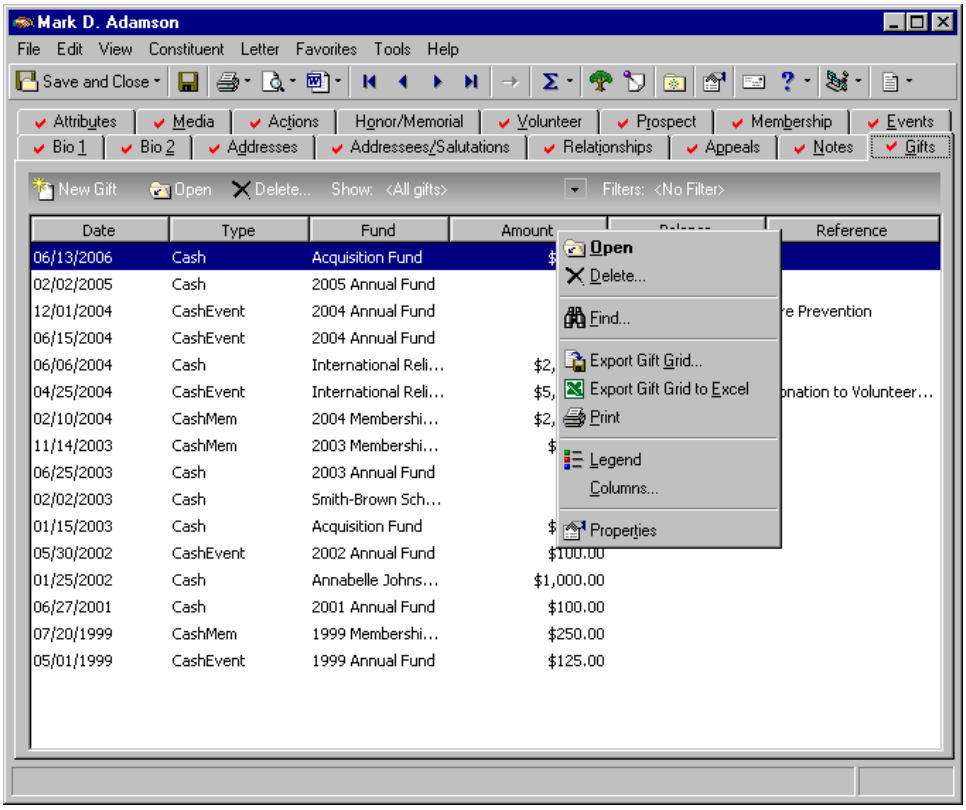
On the Gifts tab, you can click **Show** on the action bar above the grid to determine what you want to view in the grid. You can select to view Pledges and Payments, Pledges and Installments, Recurring Gifts, By Gift Type, By Campaign, By Fund, By Appeal, or By Solicitor. To view all gifts the constituent has given, simply select <All gifts>.



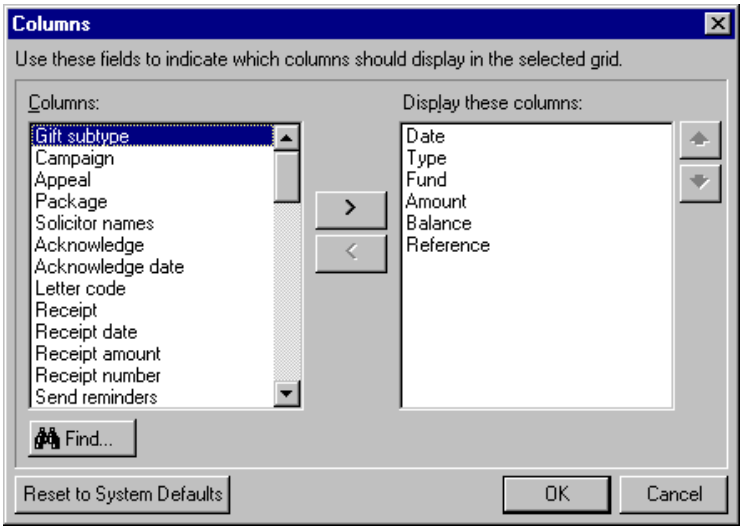
You can further filter what appears in the **Gifts** grid by clicking **Filters** on the action bar and filling in the **Campaign**, **Fund**, **Appeal**, **Date**, **From**, or **to** fields on the Filters screen that appears.



You can select optional columns to display on the Gift tab. For example, you want to view the **Pay method** field on the Gift tab of the constituent record. ***The Raiser's Edge*** does not automatically display this information on the Gift tab, but it is available as an optional column to display. To select the **Pay method** field, right-click over any column heading (such as **Amount**). A sub menu appears.

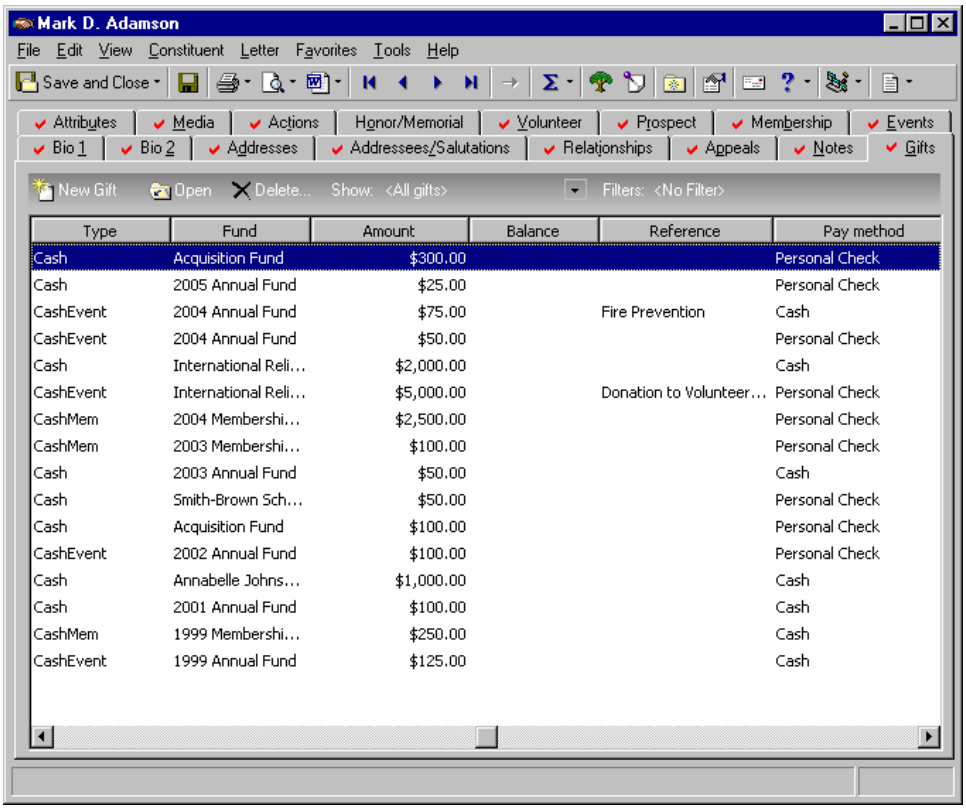


Select **Columns**. The Columns screen displays.



Note: Other tabs, such as the Transactions tab and the Installments/Payments tab, also have optional columns you can select.

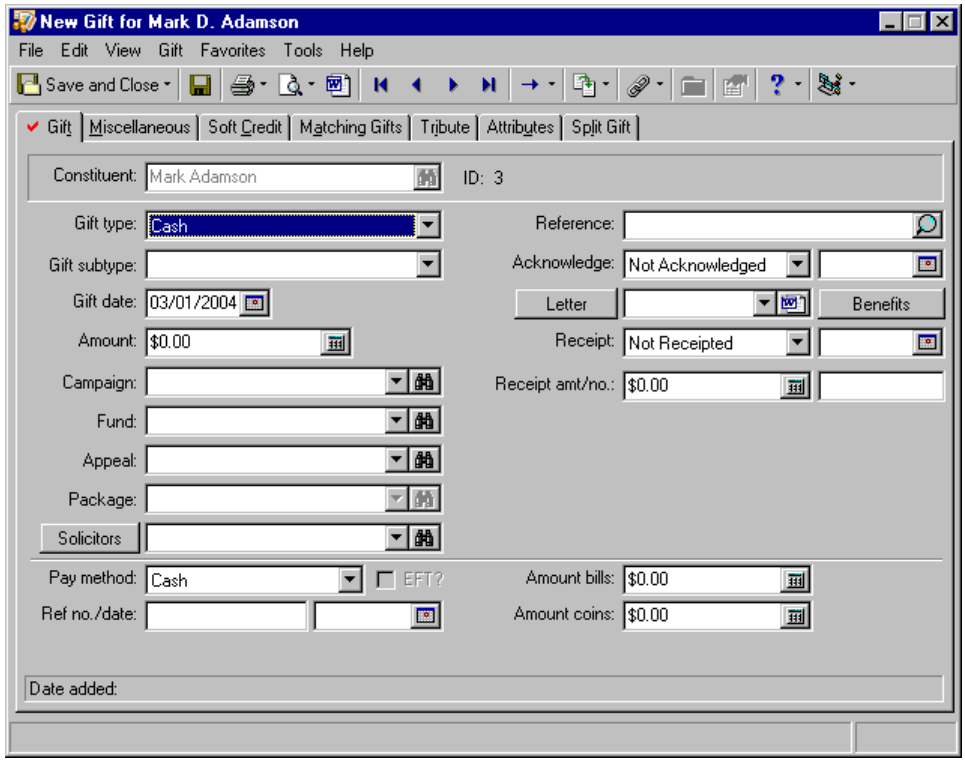
Select “Pay method” from the **Columns** box. Click the single right arrow to move the field to the **Display these columns** box. Click **OK**. **Pay method** displays on the Gift tab.



Understanding the Gift Record

Note: The Tribute tab appears only if you use the optional module *Honor/Memorial Tracking*.

A gift record helps you easily access a large amount of information by breaking down the gift data into separate tabs. When you create a new gift record, the record contains the Gift, Miscellaneous, Soft Credit, Matching Gifts, Tribute, Attributes, and Split Gift tabs.



Note: If you mark checkboxes in the **Check these tabs for data** box on the Gifts screen of the Records tab in User Options, a red check mark appears on tabs containing information. For more information about user options, see “User Options” on page 13.

As you begin to add information to the record, more tabs may appear when necessary. When you create a pledge gift, the Installments/Payments tab appears so you can define an installment schedule for the pledge. If you make an adjustment to the gift, the Adjustments tab appears so you can track the adjustments made to the gift. On a gift record for a matching gift pledge, the Pledge Payments tab appears so you can track payments made toward the matching gift pledge. For recurring gifts, the Transactions tab appears so you can track all recurring gift transactions made by the constituent.

One of the most important aspects of ***The Raiser's Edge*** is consistency in your data entry. When you enter gifts and other information consistently, you can easily retrieve accurate information from the database. We strongly recommend discussing the different gift types and their use with everyone who adds gifts to the database. If members of your organization are not consistent with data entry, you will have difficulty producing reliable reports.

For example, several donors give computers to your organization and David and Kate enter these gifts in ***The Raiser's Edge***. Kate classifies the computer gifts as Gifts-in-Kind and David classifies the gifts as Other. Because the computer gifts are not classified consistently, you will have difficulty obtaining accurate reports for the computer gifts. For more information about data entry conventions, see the *Program Basics Guide*.

Understanding Gift Types

When entering a gift into ***The Raiser's Edge***, you must enter a gift type based on the nature of the gift. For example, Cindy Melvin donates $100 to your organization using a personal check. Because a personal check is a form of Cash, enter Cash in the **Gift type** field on her gift record.

Gifts can be classified as Cash, Pledge, Gift-in-Kind, Stock/Property, Other, Recurring Gift, and Planned Gift (if you use the optional module *PlannedGiftTracker*). Because gifts affect many parts of ***The Raiser's Edge***, including reports, acknowledgements, and constituents' giving histories, it is important to understand the available gift types so you can classify gifts accurately and consistently. This section explains the uses for each gift type.

Cash. A Cash gift is a gift paid by any form of cash including currency, personal or business check, credit card, and direct debit. For example, if a constituent donates $50 using her credit card, classify this gift as Cash. You can record the type of cash received in the **Pay method** field on the Gift tab of a gift record.

Note: A pledge gift record is sometimes called a master pledge.

Pledge. A Pledge is a promise to make a future donation and can be paid in single or multiple payments, called installments. For example, a constituent may pledge to give your organization $100. Later in the month, the constituent sends a check for $100 to pay the pledge. This pledge was paid in one payment, or installment.

Note: When you select Pledge in the **Gift Type** field on a gift record, the Installments/Payments tab appears on the gift record.

When you create a gift record for a pledge, you should define a payment schedule on the Installments/Payments tab of the gift record. When you receive a pledge payment from the constituent, you must create a separate gift record for the pledge payment and apply the payment toward the pledge to reduce the balance. Gift records of all gift types, except pledge, can be applied toward a pledge to reduce the balance. For example, a constituent may pay $100 pledge with a Gift-in-Kind of a computer printer valued at $100.

Stock/Property. When a constituent donates stock or property, such as land, estate, or stock certificates, you can classify the gift as Stock/Property. When you receive a stock/property gift, your organization may choose to keep the gift or sell the stock/property to benefit the goals of your organization. When recording the value of a stock/property gift, you should enter the gift's value as of the date it is transferred to your organization. If you decide to sell the stock/property gift, you can use the **Sell Stock/Property** option to record the sale amount. For more information, see "Stock/Property Gifts" on page 76.

Gift-in-Kind. A Gift-in-Kind is a donation of goods or services for which you can easily assign a monetary value. Some examples of Gifts-in-Kind include furniture, computer equipment, and time donated by an accountant. When you add a gift record for a Gift-in-Kind, you can record an estimate of the value of the gift.

Other. Other gifts are miscellaneous donations that do not fall under one of the previous gift types. You may want to classify legacy or insurance gifts as Other gifts.

Recurring Gift. A Recurring Gift is a template used to create cash gift records at regular intervals. For example, a constituent may agree to donate $20 to your organization from his paycheck until he retires. Recurring gifts can occur for a specified or unspecified length of time. When scheduling a recurring gift, you do not need to specify the date the constituent plans to end the gift. After the constituent retires and stops sending gifts, you can edit the gift record and enter the end date for the recurring gift. For more information about recurring gifts, see "Recurring Gifts" on page 193.

Planned Giving. If you use the optional module *PlannedGiftTracker*, you can create gift records for your organization's planned giving, including information specific to numerous types of planned gift vehicles. You can record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of multiple beneficiaries and relationships for a planned gift. In addition, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets. For information, see the *Planned Gift Tracking Guide*.

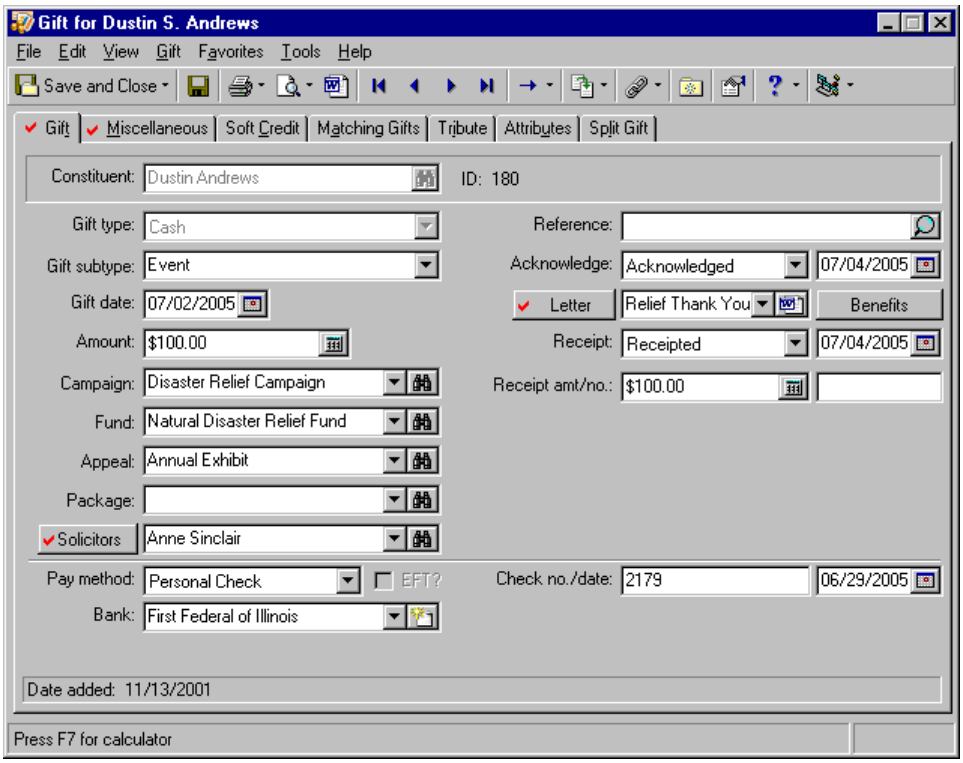
Understanding the Tabs on a Gift Record

To ensure the information on a gift record is easy to access, the gift record has been divided into several tabs. To access the information on a tab, click the tab name at the top of the gift record. This section explains all the tabs and options on a gift record. For more information about adding information to a gift record, see “Working with Gift Records” on page 68.

Gift Tab

Note: If you add a gift record from the Gifts tab of a constituent record, the program automatically enters the name of the constituent in the **Constituent** field.

The Gift tab contains key gift information, including the name of the constituent who donated the gift, the gift amount, and the fund to which the gift is designated. When adding a gift, you first need to enter the name of the constituent who donated the gift in the **Constituent** field. All other fields on the gift record remain disabled until you enter the name of the constituent who donated the gift.



Gift Types and Subtypes

Note: Gifts can be allocated to specific funds based on the **Gift type** you select. For more information, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

After entering the name of the constituent donating the gift, you need to enter the type of gift in the **Gift type** field. You can select Cash, Pledge, Stock/Property, Gift-in-Kind, Other, Recurring Gift, and Planned Gift (if you use the optional module *PlannedGiftTracker*). Each **Gift type** is explained in detail in "Understanding Gift Types" on page 24. The gift type you select determines the fields and options available on the gift record. For example, when you select Stock/Property in the **Gift type** field, the **Issuer** field and **Details** button appear below the **Receipt amt/no.** fields so you can enter specific details about the stock or property. Once you enter a gift type and save the gift record, the **Gift type** field is disabled.

You can further define a gift by entering a subtype in the **Gift subtype** field. For example, if your organization receives frequent donations of computers, you can select Gift-in-Kind in the **Gift type** field and enter a **Gift subtype** of Computers.

Note: Any subtype can be used with any gift type you select. The subtype Computers is also available to select if you select Stock/Property or any other gift type.

The **Gift subtype** field can be used to define a GL Distribution. The GL Distribution is the financial account numbers associated with the **Gift type**, **Gift subtype**, and **Fund** you select on a gift record. For example, you can specify all gifts with a subtype of Computers to be allocated to your Education fund. Because subtypes can be included in the GL Distribution, you may choose to record the payment method, such as cash or check, in the **Gift subtype** field if your organization arranges its funds by a donor's method of payment.

Regardless of whether you choose to record the payment method in the **Gift subtype** field, you must record the constituent's method of payment in the **Pay method** field at the bottom of the Gift tab. The program uses the **Pay method** field to process reports, mailings, and electronic fund transfers. For more information about GL distributions, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

You can add new gift subtypes if you have appropriate security rights. To add subtypes, enter them directly in the field or add new entries to the **Gift SubType** table using the **Tables** option of *Configuration*. For more information about adding table entries in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

Gift Dates and Amounts

When adding a gift record to your database, you must enter the gift amount and date you receive the gift on the gift record. The names for the **Gift date** and **Amount** fields change depending your selection in the **Gift type** field. The following table explains the gift amount and date fields for each gift type you can select in the **Gift type** field.

After you save the gift record for the first time, the program tracks the date you added the gift to the database in the **Date Added** display on the bottom left corner of the gift record.

Note: It is very important to be consistent with the type of information you enter in ***The Raiser's Edge***. For suggestions about data entry conventions, see the Data Entry Protocol chapter of the *Program Basics Guide*

If you change the gift amount entered on a gift record, the program does not update the soft credit distribution; the credit assigned to solicitors; the matching gift amount; the pledge installment schedule; the split gift distribution; or the amount linked to a membership, event, or proposal. If you change the gift amount, you need to update these entries to reflect the new gift amount.

Gift Type	Field Name	Comments
Cash	Gift date	Enter a date to associate with the gift. To make the **Gift date** field meaningful, you need to decide on a convention, such as entering the date your organization received the gift.
	Amount	Enter the total monetary amount for the gift. You must enter an amount for the gift. However, you can enter zero for the gift amount, if necessary.

Gift Type	Field Name	Comments
Pledge	Pledged on	Enter the date the constituent pledged to donate the gift.
	Pledge amt	Enter the total amount the constituent agreed to give. For example, if a constituent pledges to give $50 each month for the next year, enter $600 in the **Pledge amt** field. When you define the installment schedule, the program divides this amount to create twelve installments of $50. You can enter $0 in the **Pledge amt** field, if necessary. For example, if a constituent agrees to make a pledge but does not know how much he can give at this time, you can enter $0 in the **Pledge amt** field. When the constituent donates a gift, you can update the **Pledge amt** field to reflect the actual amount of the gift.
Stock/Property	Gift date	Enter the date you want to associate with the gift. To make the **Gift date** field meaningful, you need to decide on a convention, such as entering the date your organization received the gift.
	Value	Enter the monetary value of the stock or property on the day you received it. You can enter $0 in the **Value** field, if necessary. For example, if you are adding a Stock/Property gift of 10 acres of land, you may not know the value of the land until it has been appraised. When you sell stock or property, you can convert the corresponding gift record to a cash gift using the **Sell Stock/Property** option. For more information about this option, see “Selling a Stock/Property Gift” on page 81.
Gift-in-Kind	Gift date	Enter the date you want to associate with the gift. To make the **Gift date** field meaningful, you need to decide on a convention, such as entering the date your organization received the gift.
	Value	Enter the monetary value of the gift on the day you received it. If you do not know the exact value of the gift, make an estimate for tracking purposes. You must enter an amount for the gift. However, you can enter $0 in the **Amount** field, if necessary. For example, if you are adding a Gift-in-Kind of 10 computers, you may not know the exact value of the computers.
Other	Gift date	Enter a date to associate with the gift. To make the **Gift date** field meaningful, you need to decide on a convention, such as entering the date your organization received the gift.
	Amount	Enter the total monetary amount for the gift. If you do not know the exact value of the gift, make an estimate for tracking purposes. You must enter an amount for the gift. However, you can enter $0 in the **Amount** field, if necessary. For example, if you are entering a legacy gift, you may not know how much the gift is worth at this point in time.

Gift Type	Field Name	Comments
Recurring Gift	Gift date	Enter the date the constituent agreed to donate the gift. To make the **Gift date** field meaningful, you need to decide on a convention, such as entering the date your organization received the gift.
	Amount	Enter the amount the constituent wants to pay at a recurring interval. For example, if a constituent wants to donate $20 each month, enter $20 in the **Amount** field. For more information about creating and scheduling recurring gifts, see "Recurring Gifts" on page 193.
Planned Gift (if you use the optional module *PlannedGift Tracker*)	Gift date	Once a constituent commits to a planned gift, enter the date the constituent agreed to the commitment in the **Gift date** field.
	Amount	Enter the amount the constituent donates to establish the planned gift. You can enter $0 in the **Amount** field if the planned gift amount is not known.
	Remainder value/as of	The amount in the **Remainder value** field should reflect the expected income amount for your organization once all the conditions for a planned gift are met. Use the **as of** date field to track the last date the remainder value amount has been updated.

For more information about the gift type of Planned Gift, see the *Planned Gift Tracking Guide*.

Campaigns, Funds, Appeals, and Packages

Warning: You can add a new campaign, fund, or appeal from a gift record. However, we recommend adding the campaign, fund, or appeal from the Records page so you can properly set up the record and define fundraising goals.

When you begin to raise funds, you specify a purpose for the funds you intend to raise, define a monetary goal to achieve, and develop a structured plan to realize your goals. Before you begin adding gifts to the database, you must define this structure and set your goals in ***The Raiser's Edge***. Then, when you begin to receive gifts, you can track your progress and evaluate the cost-effectiveness of your efforts. To define the structure of your fundraising plan, you must set up campaign, fund, appeal, and package records.

Campaign. Overall purpose for raising money.

Fund. Specific financial purpose for a gift.

Note: When you enter campaigns, funds, and appeals on the gift record, you can select in User Options whether to display the description or ID in the **Campaign**, **Fund**, and **Appeal** fields on a gift record. For more information about selecting to enter data by ID or description, see the User Options chapter of the *Program Basics Guide*.

Appeal. Methods your organization uses to generate gifts.

Package. Different mediums of solicitation within a single appeal.

To learn how to set up campaign, fund, appeal, and package records, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

When you receive gifts donated in response to your fundraising efforts, you can specify on the Gift tab of a gift record the campaign, fund, appeal, and package to which the gift belongs. In the **Campaign** and **Fund** fields, specify how you plan to use the gift. In the **Appeal** and **Package** fields, select the appeal and package used to ask the constituent to donate the gift. It is important to enter this information for each gift so you can develop statistics to determine the campaign's financial progress and the cost-effectiveness of your appeals and packages.

To select a campaign, fund, appeal, or package on the gift record, click the binoculars to search for the record or click the down arrow to select from a list.

Note: Your entry in the **Fund** field can affect the GL Distribution for the gift. For more information about GL Distributions, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

You can also select a campaign, fund, appeal, or package by typing the name directly in the field. However, we recommend searching for the field entry or selecting the field entry from the list so duplicate campaigns, funds, appeals, or packages are not added.

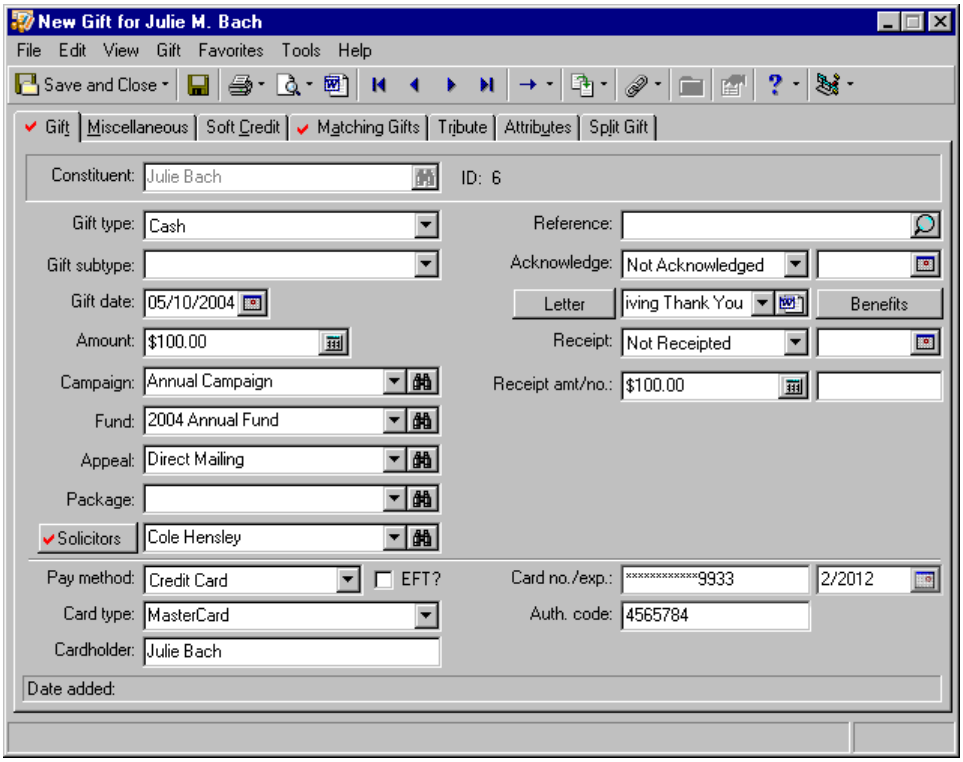
Entering Multiple Campaigns, Funds, Appeals, or Packages on a Gift Record

On the Gift tab, you can select only one campaign, fund, appeal, and package. However, you can divide a gift among multiple campaigns, funds, appeals, and packages on the Split Gift tab of a gift record. For example, you send a newsletter containing information about two of your campaigns to a group of prospective donors. One of the constituents sends a gift to your organization and requests the gift be divided evenly between your two campaigns. You can divide the gift between the two campaigns on the Split Gift tab. For more information about splitting a gift, see the "Split Gift Tab" on page 64.

Assigning Defaults for Campaigns, Funds, Appeals, and Packages

Tip: Defaults are guidelines you can set up to simplify data entry. When the program enters a default in a field, you can change it by selecting the text and typing over it with the correct entry.

When you set up a campaign, fund, appeal, or package record, you can set defaults to appear on the gift record. For example, if the campaign you select has default funds, appeals, or solicitors entered on the campaign record, the program enters these defaults automatically in the **Solicitors**, **Fund**, and **Appeal** fields when you tab through the **Campaign** field. The program adds defaults only to blank fields. For example, if you add Cole Hensley as the default solicitor for the Annual Campaign, Cole's name appears in the **Solicitors** field when you select Annual Campaign in the **Campaign** field.



If you enter Mary Smith in the **Solicitors** field before you select Annual Campaign in the **Campaign** field, the program does not add Cole Hensley's name in the **Solicitors** field because you already entered Mary Smith. When you enter multiple default funds, appeals, or solicitors on a campaign record, the program splits the gift as you specified on the campaign record. For more information about adding defaults for campaigns, funds, and appeals, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

Accessing Campaign, Fund, Appeal, and Package Records from the Gift tab of a Gift Record

Note: To view package information, open the corresponding appeal record and select the Package tab.

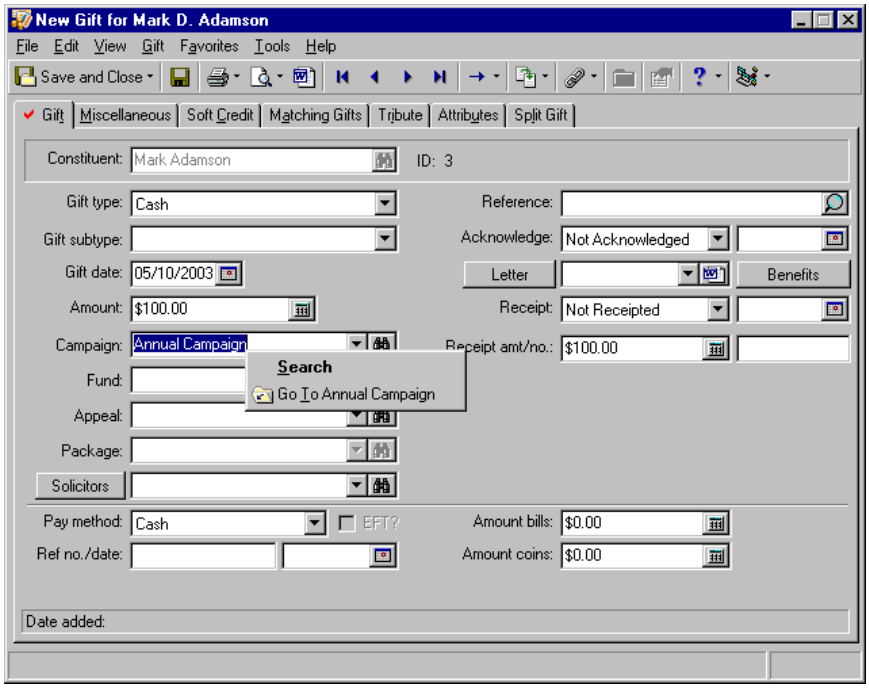
After entering a campaign, fund, or appeal on the Gift tab, you can open the corresponding record directly from the gift record. You may want to open a campaign, fund, or appeal record to verify information entered on the record or determine the progress of your fundraising efforts.

- **Opening a campaign, fund, or appeal record from the Gift tab**

  You can access a campaign, fund, or appeal record from the Gift tab if you have not split the gift. If you split the gift, you can access the campaign, fund, or appeal record from the Split Gift tab.

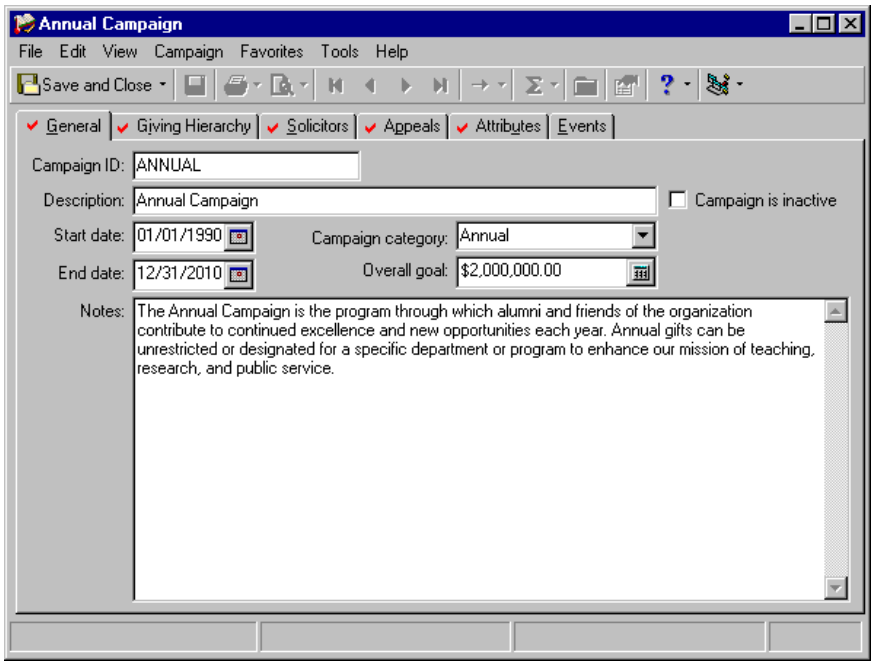
Warning: If the shortcut menu does not appear, make sure you selected a campaign, fund, or appeal in the appropriate field. If the **Go to** option on the shortcut menu is not present or is disabled, you may not have security rights to open the campaign, fund, or appeal record.

1. From the Gift tab of a gift record, right-click in the **Campaign**, **Fund**, or **Appeal** field. When the shortcut menu appears, select **Go to**.



Note: Because a package's information is stored in the Packages tab of an appeal record, you cannot view package information this way. To select a package, use the drop down arrow or click the binocular button in the **Package** field.

2. When the record appears, you can view or edit the information on it.



3. Click **Save and Close** on the toolbar to save your changes and return to the gift record.

Crediting Solicitors for a Gift

Note: When you credit multiple solicitors for a gift, the program does not require the total distributed credit to equal the gift amount. However, a single solicitor cannot be credited for more than the gift amount.

When your organization receives a gift because of work performed by a solicitor, you can credit the solicitor on the gift record for the full or partial gift amount. For example, during your annual phonathon, Mary Smith, a solicitor, called John Riley asking for a donation of $1,000. If John decides to donate a gift, you can give credit to Mary in the **Solicitors** field on John's gift record. You should give credit to solicitors on gift records so you can track the overall performance of your solicitors. For more information about solicitors, see the Solicitors chapter of the *Constituent Data Entry Guide*.

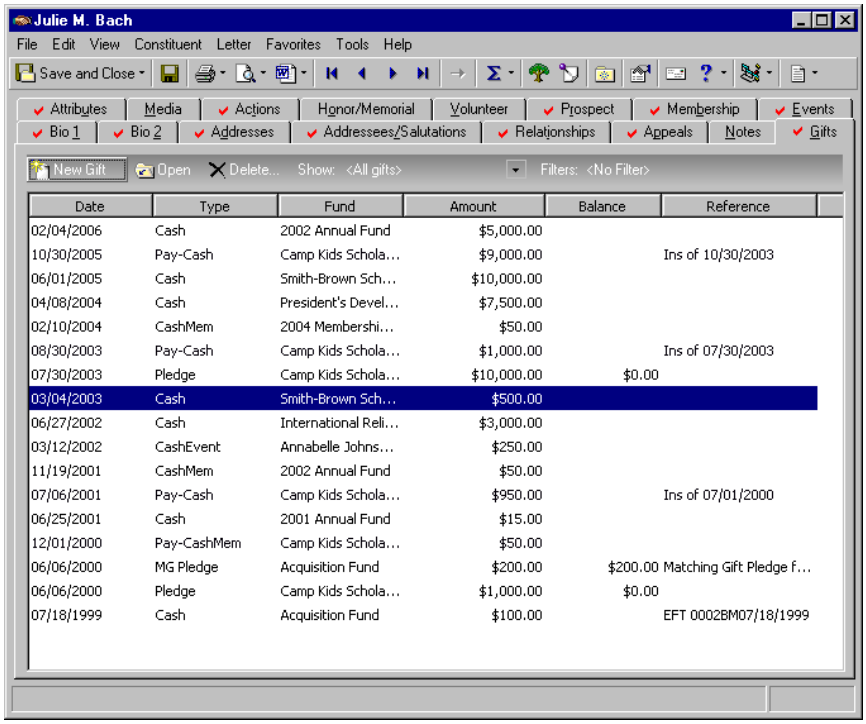
- **Crediting single and multiple solicitors for a specific amount or percentage of a gift**

  You can use this procedure to credit multiple solicitors for a single gift or adjust the amount of credit due to a single solicitor.

  Scenario: On 03/04/2003, you received a $500 gift from Julie Bach for your Smith-Brown Scholarship Fund. You already added this gift record to the database. Now, open Julie's gift record and credit Ellen Crenshaw and Earl Hunter as solicitors for this gift. Ellen and Earl should split the credit for this gift.

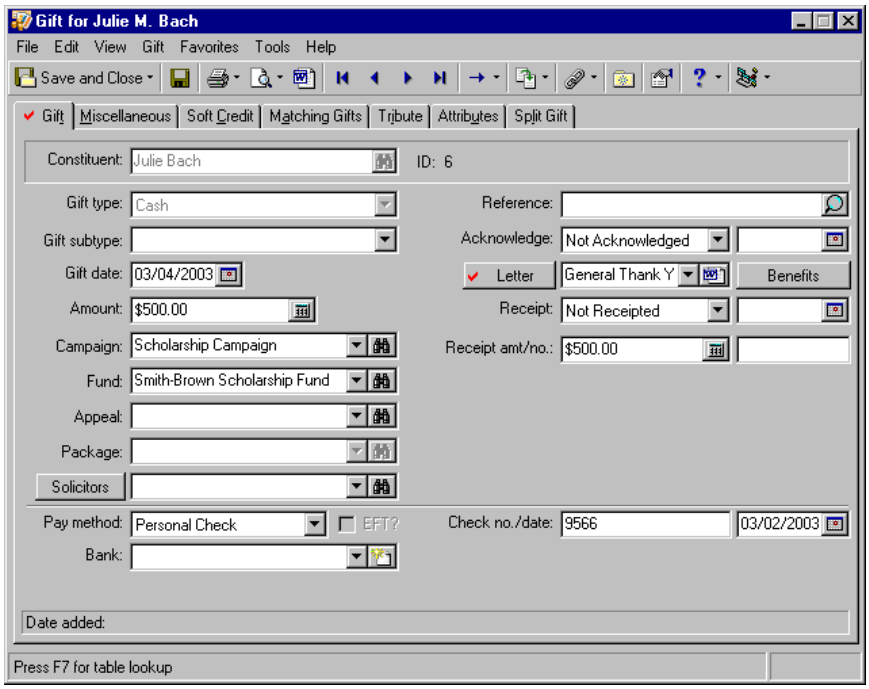
Warning: When you change the gift amount entered on a gift record, the gift amount you credit a solicitor is not updated. If you change the gift amount, you need to verify the credit you assign the solicitors is correct for the current gift amount.

1. From the Gifts tab of Julie Bach's constituent record, select her $500 gift with a gift date of 03/04/2003. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



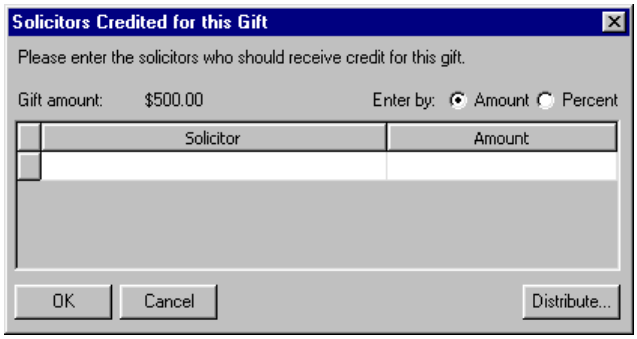
2. On the action bar, click **Open**.

3. On Julie Bach's gift record, select the Gift tab.



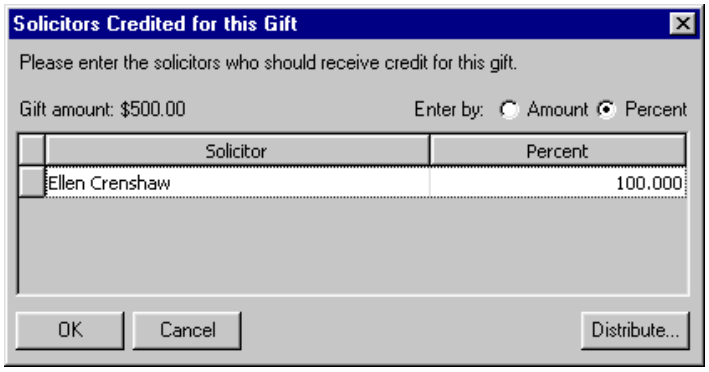
Warning: You can also search for a solicitor by clicking the drop-down arrow, by clicking the binoculars that appear in the **Solicitors** field, or by pressing **F7** on your keyboard. The solicitor names listed in the drop-down list are the donor's assigned solicitors from her Relationships tab.

4. Click the **Solicitors** button. The Solicitors Credited for this Gift screen appears.



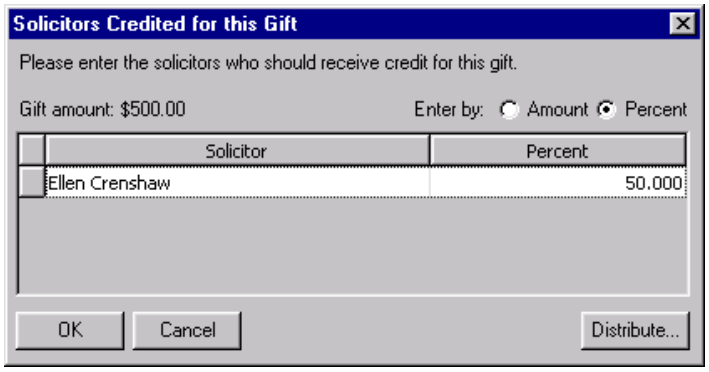
5. In the **Enter by** field, select whether you want to credit solicitors based on the amount or percent of the gift. For this example, select **Percent**. In the grid, the **Amount** column changes to the **Percent** column.

6. To enter the name of the first solicitor, click the first cell in the **Solicitor** column. When you place the cursor in this field, the binoculars appear. Click the binoculars to search the database for Ellen Crenshaw. When you locate Ellen Crenshaw in the database, her name appears in the first row of the **Solicitor** column on the Solicitors Credited for this Gift screen.



Note: If you want to credit solicitors for the full amount of the gift, leave the default of "100" in the **Percent** column.

7. In the **Percent** column, enter "50".

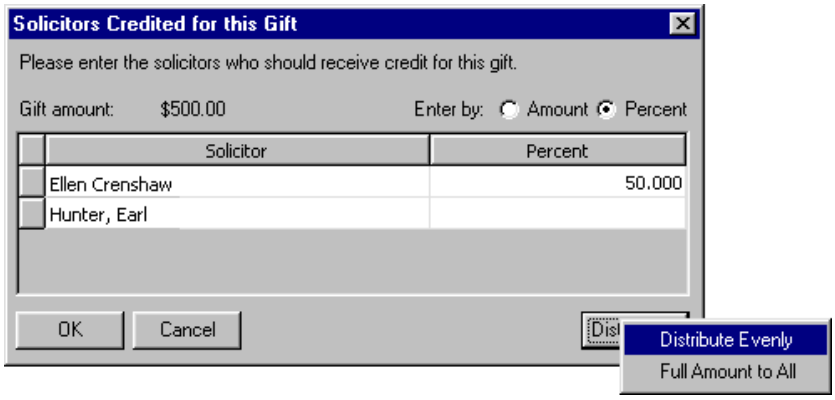


Tip: It is not necessary to type a % symbol in the **Percent** column. The program automatically formats the percentage when you leave this column.

8. With the cursor in the **Percent** column on the first row, press the **TAB** key on your keyboard to create a second row in the grid.
9. In the second row of the **Solicitor** column, click the binoculars to search for "Earl Hunter". For more information about the Open screen, see the *Program Basics Guide*.

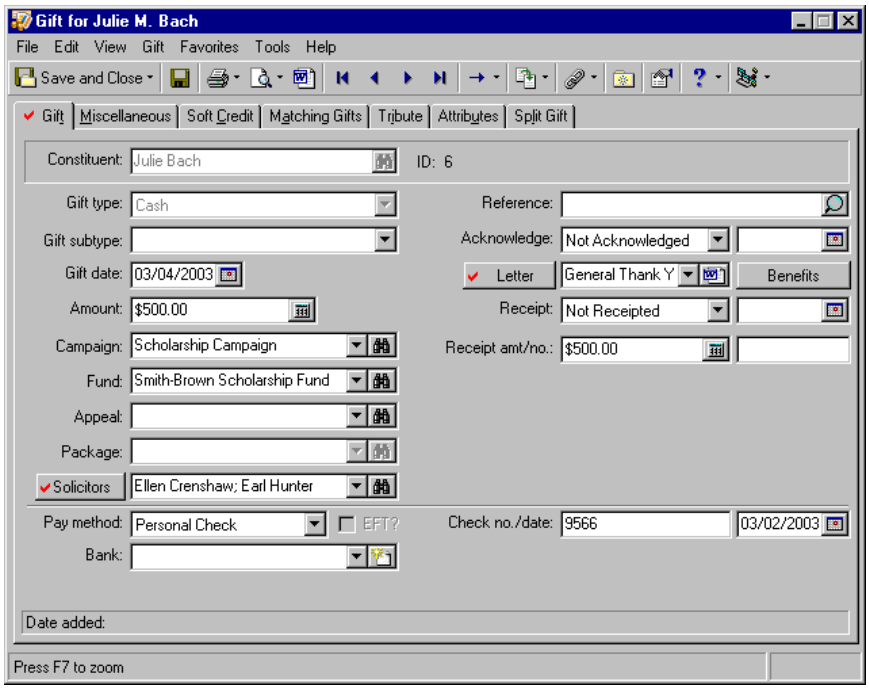
Tip: If you use the **Distribute** button, it is not necessary to enter any numbers in the **Amount** or **Percent** column. Simply tab through the **Amount** or **Percent** column and enter the name of the next solicitor in the **Solicitor** column.

10. Click **Distribute** and select **Distribute Evenly** from the submenu. When you select **Distribute Evenly**, each solicitor receives the same amount of credit for the gift. Because you entered two solicitors, each solicitor receives credit for 50% of the gift. If necessary, you can credit each solicitor listed on the Solicitors Credited for this Gift screen for the full amount of the gift by selecting **100% to All**.



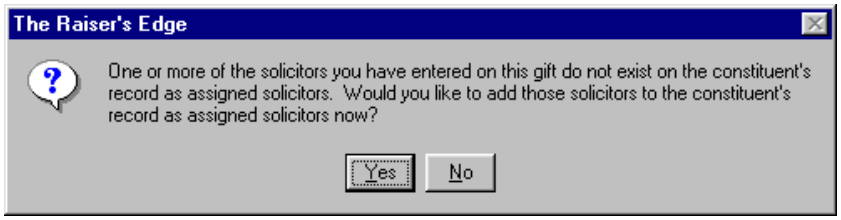
Note: Click **Solicitors** if you want to edit any solicitor information.

11. Click **OK** to return to the Gift tab on the gift record. The names of the solicitors appear in the **Solicitors** field separated by semicolons.

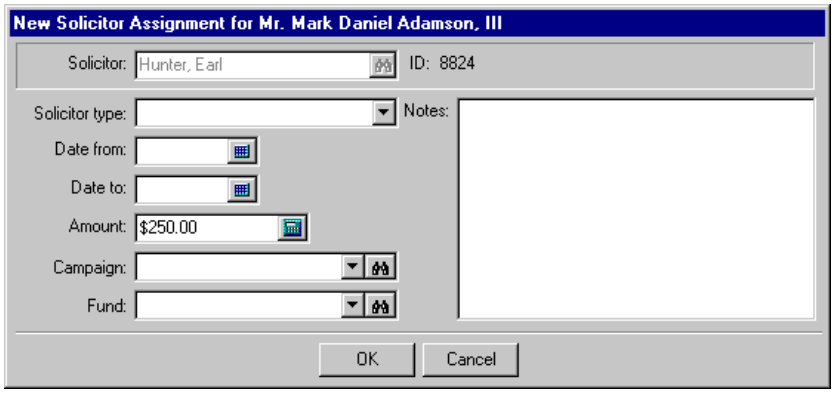


12. On the toolbar, click **Save and Close**.

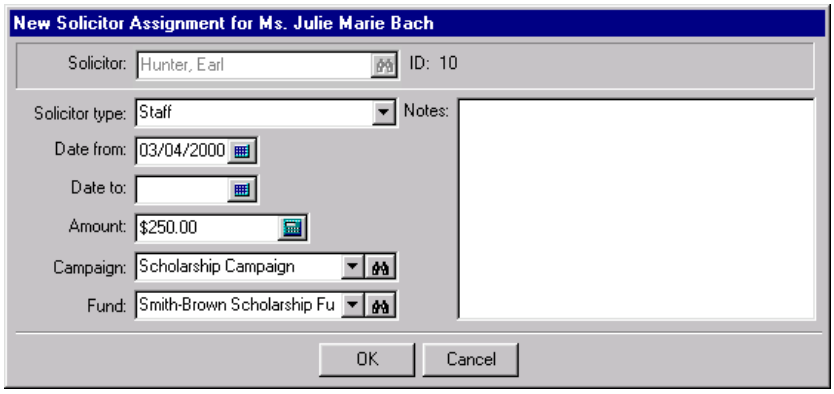
13. If one or more solicitors you enter in the **Solicitors** field are not entered on the Relationships tab of the donor's constituent record, the program displays a message.



14. Click **Yes** to add the solicitor to the Relationships tab of the donor's constituent record. The New Solicitor Assignment screen appears so you can enter details about the assignment. If you click **No**, the program credits the solicitors listed on the gift record but does not add the solicitors to the Relationship tab of the donor's constituent record.



15. Add the necessary information about the solicitor on the New Solicitor Assignment screen. For more information about the New Solicitor Assignment screen, see the Solicitors chapter of the *Constituent Data Entry Guide*.



16. Click **OK**. The solicitor is added to the Relationships tab of the donor's constituent record and the gift is saved.

Opening a Solicitor's Constituent Record from a Gift Record

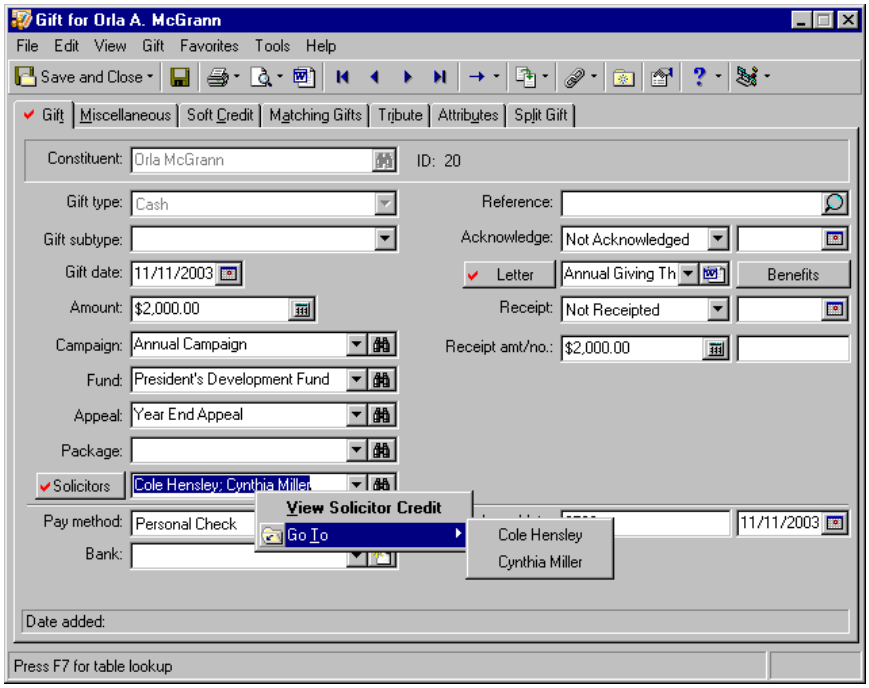
When you credit a solicitor on a gift record, you may need to open the solicitor's constituent record to verify or update information. For example, you may want to add a note about the solicitor's performance on the Notes tab of the solicitor's constituent record.

Opening a solicitor's constituent record from the Gift tab of a gift record

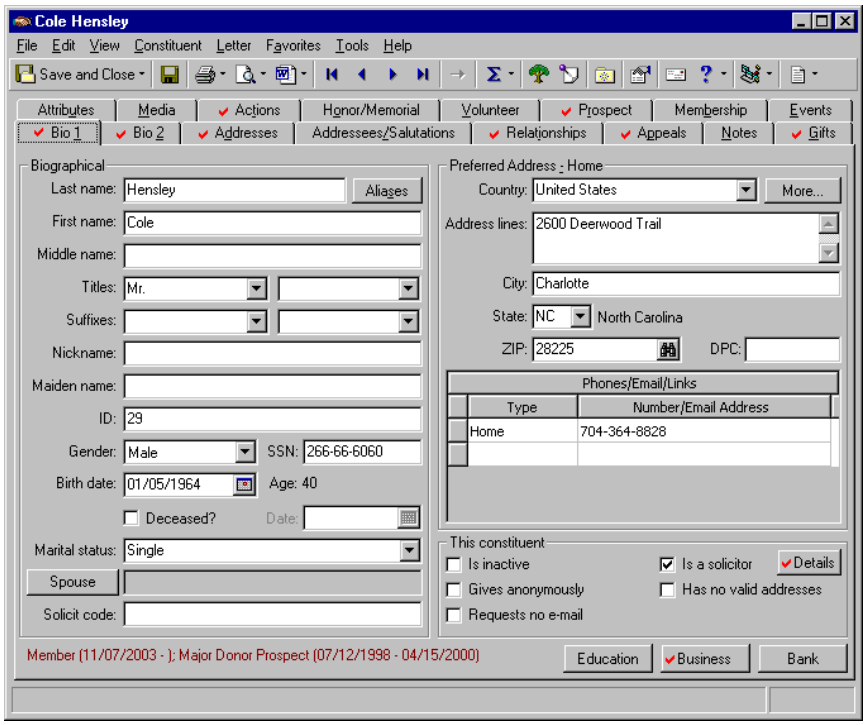
Before you can access a solicitor's constituent record, you must enter the names of one or more solicitors in the **Solicitors** field. You can open the constituent records only for solicitors associated with the gift.

Warning: If the shortcut menu does not appear, make sure you entered a solicitor's name in the **Solicitors** field. If the **Go to** option on the shortcut menu is not present or is disabled, you may not have security rights to open the solicitor's constituent record.

1. From the Gift tab of a gift record, right-click in the **Solicitors** field. For more information about opening a gift record, see "Accessing a Gift Record" on page 7. When the shortcut menu appears, select **Go to** and the solicitor's name.



2. When the record appears, you can view or edit information, as necessary.



3. Click **Save and Close** to return the Gift tab of the gift record.

Reference

In the **Reference** field on a gift record, you can enter up to 255 characters of free-form text information about a gift. For example, you can add “Gift donated to support volunteer dinner.” You can also enter information about stock gifts, such as “40 shares of XYZ Company”. If a reference note is too long to view in the **Reference** field, you can click the magnifying glass to expand the text box and view the entire message.

When you create certain types of gift records, the program automatically inserts information when the **Reference** field is blank. For example, when you apply a cash gift record to a pledge, “Ins of 02/05/2000” appears in the **Reference** field on the cash gift record. This message indicates the gift record is applied to the pledge installment due on 02/05/2000. The following table lists the text automatically inserted in the **Reference** field for certain gift types.

Gift record type	Text	Example
Pledge Payment	Ins of {installment due date}	Ins of 11/11/2001
Stock/Property (Sold)	Sold for {Sale amount}	Sold for $1,000
Matching Gift Pledges and Payments	{Name of constituent who generated the matching gift pledge}	Frank Rubenstien

Acknowledgement Letters

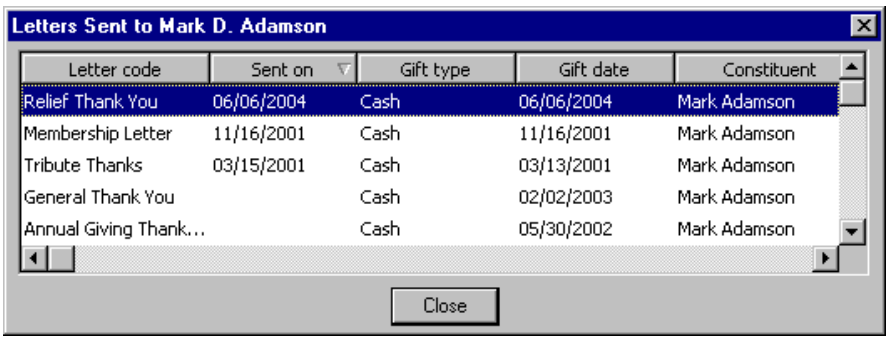
When a constituent donates a gift, you can use the **Acknowledge** field to track whether you sent a letter thanking a constituent for his gift. In this field, you can select Acknowledged, Not Acknowledged, or Do Not Acknowledge. In the field to the right of the **Acknowledge** field, enter a reference date, such as the date you mailed the letter. For example, if you handwrite a thank-you letter to a constituent, you can select Acknowledged in the **Acknowledge** field and enter the date you mailed the letter in the date field.

If you use Microsoft *Word 2000* or *Word XP*, you can create a single acknowledgement letter from a gift record using the Word icon in the **Letter** field. To create a customized acknowledgement letter from a gift record, you can select the merge fields you want to export out of ***The Raiser's Edge*** to use within your letter and create the merge document from the **Letters** link of *Configuration*. Then, you can select the letter from the **Letter** field and click the Microsoft *Word* icon on a gift record to automate the merge process. For more information about sending an acknowledgement letter from a gift record, see "Creating an Acknowledgement Letter from a Gift Record" on page 101.

Note: If you enter a date in the acknowledgement date field before you use *Mail* to print an acknowledgement letter, the program still updates the acknowledgement date field with the date you print the letters in *Mail*.

If you use the Donor Acknowledgement Letters mail task in *Mail* to print your acknowledgement letters, select Not Acknowledged in the **Acknowledge** field, and do not enter a reference date. After you create an acknowledgement letter for this gift in *Mail*, the program automatically updates the **Acknowledge** field to Acknowledged and enters the date you printed the letters. When you select Acknowledged or Do Not Acknowledge, *Mail* does not create an acknowledgement letter for this gift. For more information about creating acknowledgement letters in *Mail*, see the *Mail Guide*.

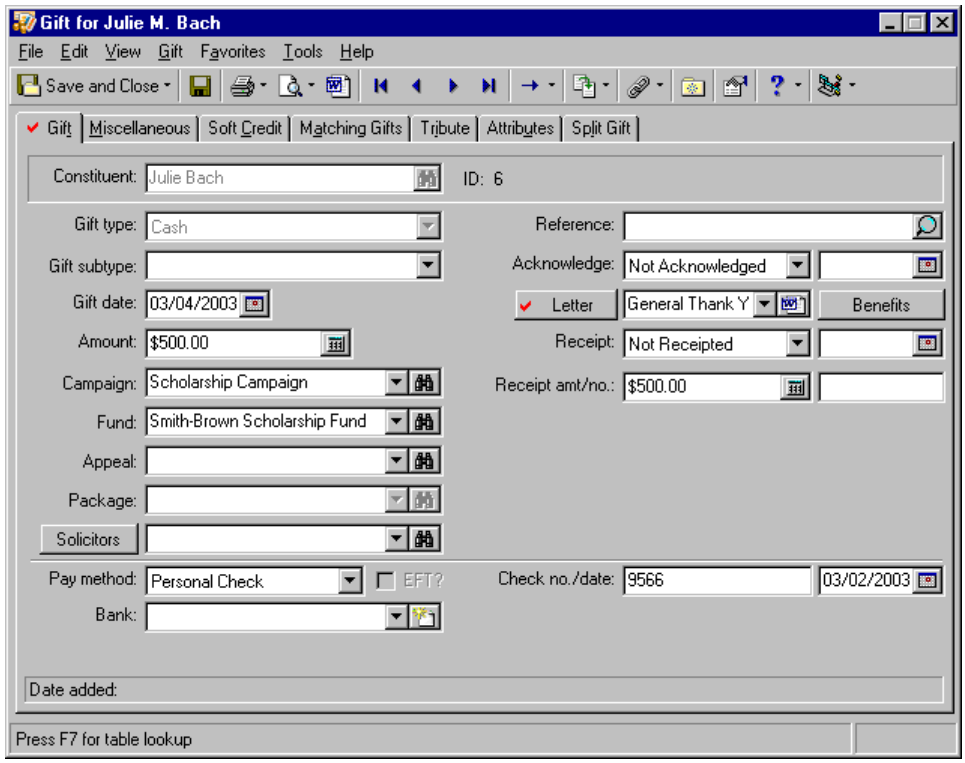
To view a history of acknowledgement letters related to the current constituent record, click the **Letter** button. The Letters Sent screen appears.



The **Letter code** column displays all letters sent to the constituent. The **Sent on** column displays the date you sent each letter. The dates entered in the **Sent on** column are the dates from the acknowledge date field on gift records for the constituent for whom you are adding a gift. In addition, the **Gift type**, **Gift date**, and **Constituent** name displays on the Letters Sent screen.

You can display the list of letters in ascending or descending order according to **Sent on**. To toggle between ascending and descending order, click the arrow in the **Sent on** column title.

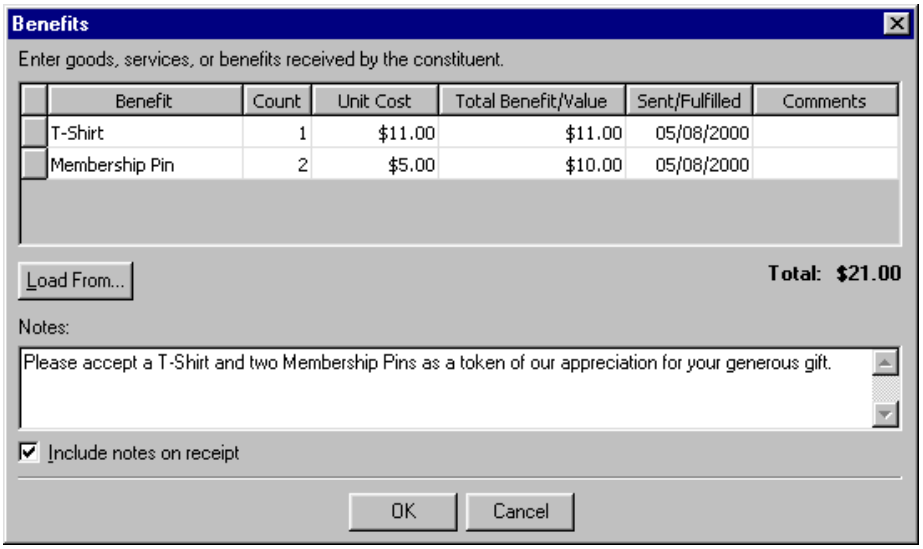
In the field next to the **Letter** button on the Gift tab, you can select the name of the letter you want to send to thank the constituent.



For example, you have a mail merge letter called Tribute Thanks that you send to all constituents who donate a gift to a tribute. In *Configuration*, you can define the acknowledgement letters available to select. For more information about setting up acknowledgement letters, see the Configuration chapter of the *Configuration & Security Guide*.

Benefits

Membership benefits are gifts your organization gives to constituents depending on the level of membership they agree to join or the dues they decide to pay. For example, when a constituent donates a gift, you may send them a free shirt or newsletter, as thanks for the donation. Membership benefits are associated with dues, in terms of the benefit package a member receives. Though the dues are not considered payment for the benefits a member receives, the benefits value could account for a difference between an initial gift amount and how much of that gift actually counts, say, for tax purposes. To add the benefits due to a constituent, click the **Benefits** button on the Gift tab of a gift record. When you click **Benefits**, the Benefits screen appears.



Calculating the benefits package monetary amount is important. Receipts for all gifts associated with membership benefits should take into account the monetary value of the benefits. In the Benefits grid, you can itemize the benefits a constituent receives and calculate the total cost of the benefits to your organization. For example, when you give a T-Shirt and two Membership Pins to a donor, the cost to your organization may be $21.

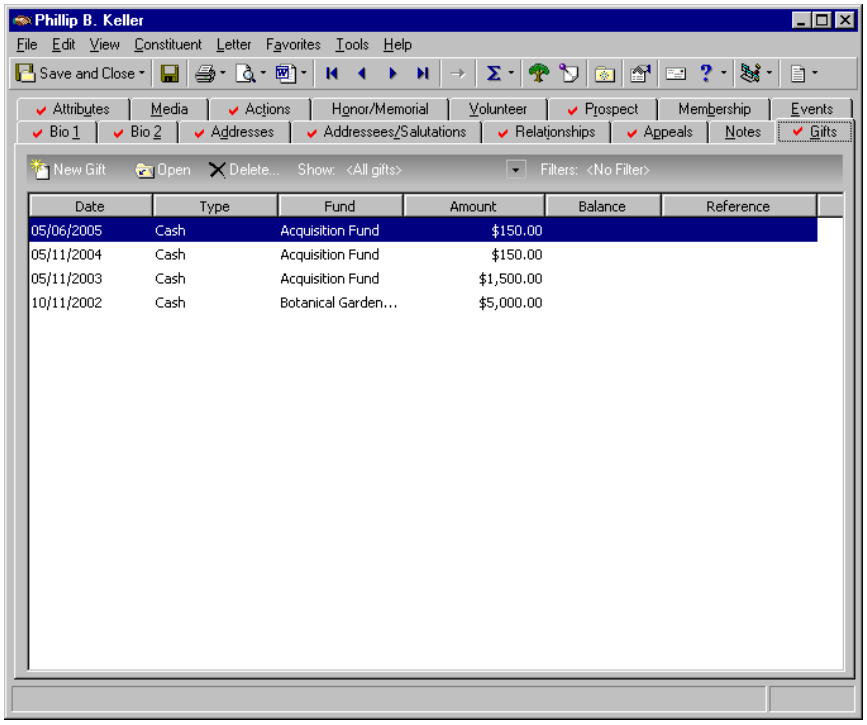
Adding Benefits to a Gift Record

When you give benefits to a constituent in response to a donation the constituent makes, you need to record the benefits on the donor's gift record.

Adding benefits to a gift

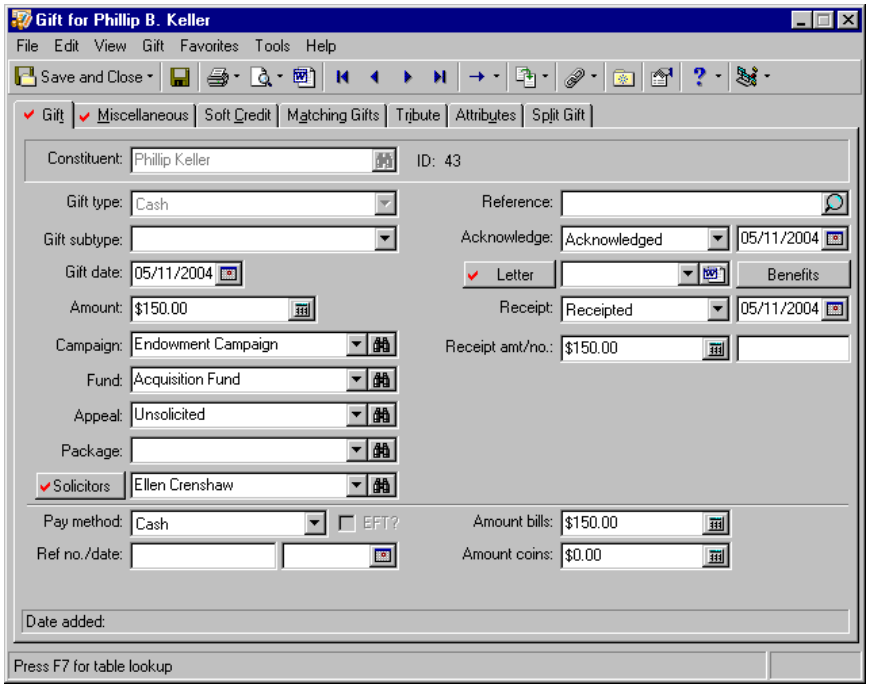
Scenario: On 05/11/2004, Phillip Keller donated $1,500 to your 2004 Acquisition Fund. You already added a gift record to the database for Phillip's gift. On 05/15/2004, you sent Phillip a T-Shirt and 2 free tickets to your museum. Now, open Phillip's gift record and record the benefits on the Gift tab.

1. From the Gifts tab of Phillip Keller's constituent record, select his $1,500 gift with a gift date of 05/11/2004. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



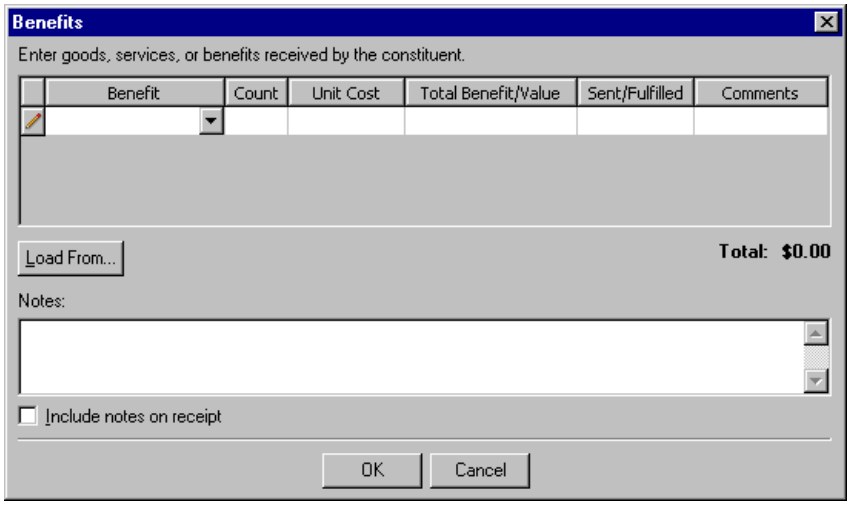
2. On the action bar, click **Open**. The gift record appears.

3. Select the Gift tab.



Note: You can add entries to the **Benefits** table from *Configuration*. On the *Configuration* page, click **Tables** and select **Benefits** from the list on the left side of the screen. After you select **Benefits**, click **New Table Entry** on the action bar to add additional benefits to the list. You can also enter a default unit cost for each benefit through the **Tables** option in *Configuration*.

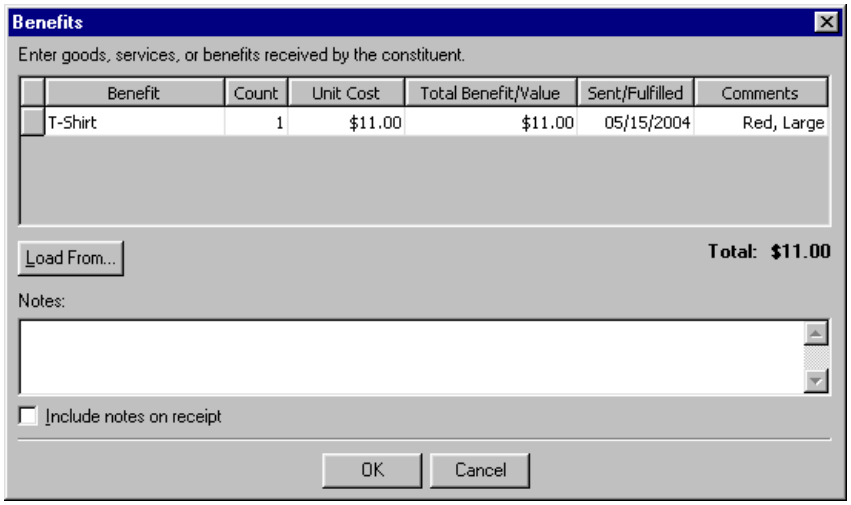
4. Click **Benefits**. The Benefits screen appears.



5. In the first row of the **Benefit** column, click the arrow and select “T-Shirt” from the list.
6. In the first row of the **Count** column, enter “1” to indicate you are sending one T-Shirt to the constituent.

Note: The program calculates the **Total Benefit Value** of each row by multiplying the **Count** by the **Unit Cost**.

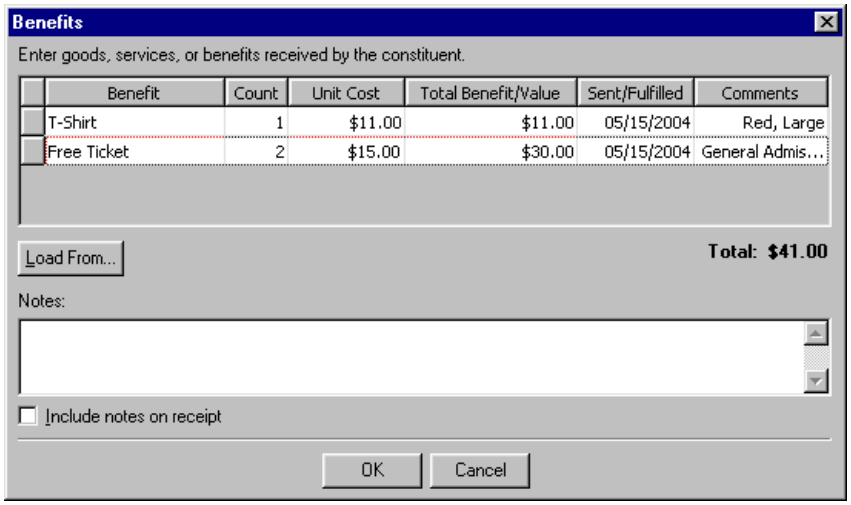
7. In the first row of the **Unit Cost** column, the program defaults the amount $11 because this is the **Unit Cost** entered in *Configuration* for a T-Shirt. It is not necessary to change the **Unit Cost** for the T-Shirt. When you tab through the **Unit Cost** column, the program automatically calculates the **Total Benefit Value** of the T-Shirt.
8. In the **Sent/Fulfilled** column, enter the date 05/15/2004 because this is the date you sent the T-Shirt to Phillip.
9. In the **Comments** column, enter any notes about the T-Shirt. For example, you can record the color and size sent.



Note: You can also add a new row to the grid by clicking the gray square at the beginning of the first row in the grid. This selects the first row of the grid. With the row selected, right click the mouse anywhere in the grid. When the shortcut appears, select **Insert row**.

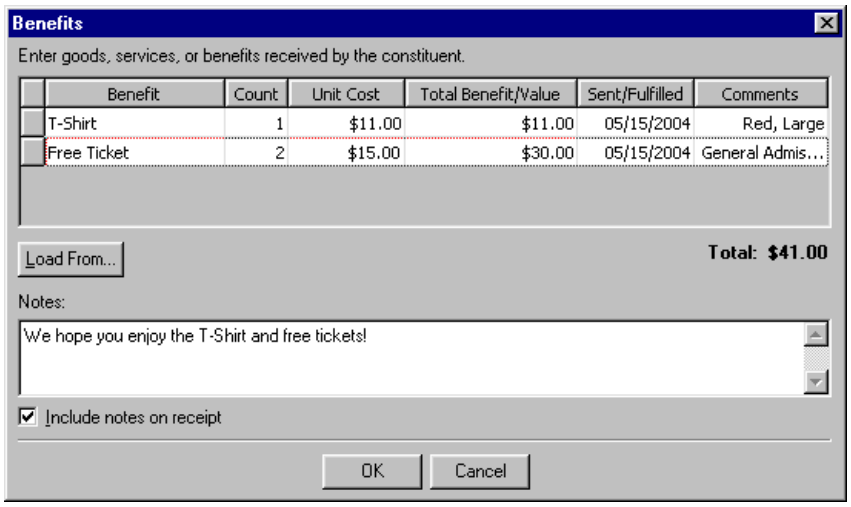
10. With your cursor in the first row of the **Comments** column, press **TAB** on your keyboard to create a new row in the grid.
11. In the second row of the **Benefit** column, select “Free Ticket”.
12. In the second row of the **Count** column, enter “2” to indicate you are sending two tickets to the constituent.
13. In the second row of the **Unit Cost** column, the program defaults the amount $15 because this is the **Unit Cost** entered in *Configuration* for one Free Ticket. It is not necessary to change this **Unit Cost**. When you **TAB** through the **Unit Cost** column, the program automatically calculates the **Total Benefit Value** of the two Free Tickets.
14. In the **Sent/Fulfilled** column, enter the date 05/15/2004 because this is the date you sent the free tickets to Phillip.

15. In the **Comments** column, enter any notes about the tickets. For example, you can indicate the type of tickets sent.



Note: The **Total** display shows the total value for all the benefits you entered on the Benefits screen.

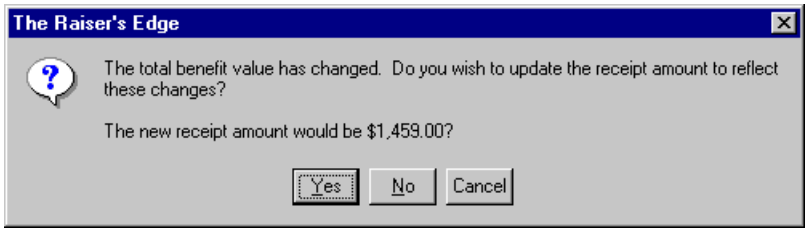
16. In the **Notes** box, enter "We hope you enjoy the T-Shirt and free tickets!"
17. To print these notes on Standard Receipts in *Mail*, you must mark the **Include notes on receipt** checkbox. For more information about printing receipts in *Mail*, see the Receipts chapter of the *Mail Guide*.



Warning: The total benefit value cannot be greater than the gift amount.

18. After you add all the benefits the constituent should receive, click **OK**. If the total benefit value is greater than the gift amount, the program displays the message "The total value of the benefits cannot exceed the gift amount."

19. Receipts for all gifts associated with membership benefits should take into account the monetary value of the benefits. Therefore, when you add any information on the Benefits screen that changes the benefit **Total**, the program displays a message.

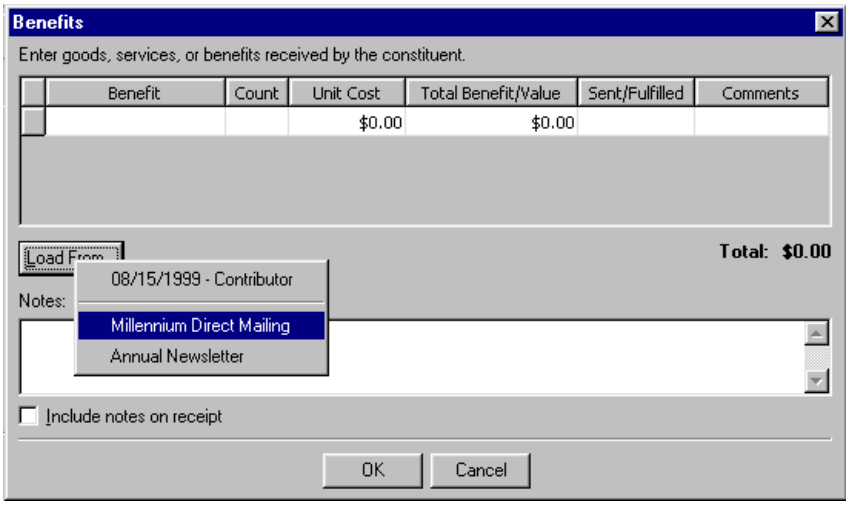


Note: The new receipt amount on the gift record is $1,459 because the total benefit value of $41 is subtracted from the original receipt amount of $1,500.

20. Click **Yes** to update the receipt amount to reflect the new benefit cost. Click **No** to retain the original receipt amount. You can click **Cancel** to return to the Benefits screen to make any necessary changes.
21. Click **Save and Close** on the toolbar of the gift record.

Adding Default Benefits to a Gift Record

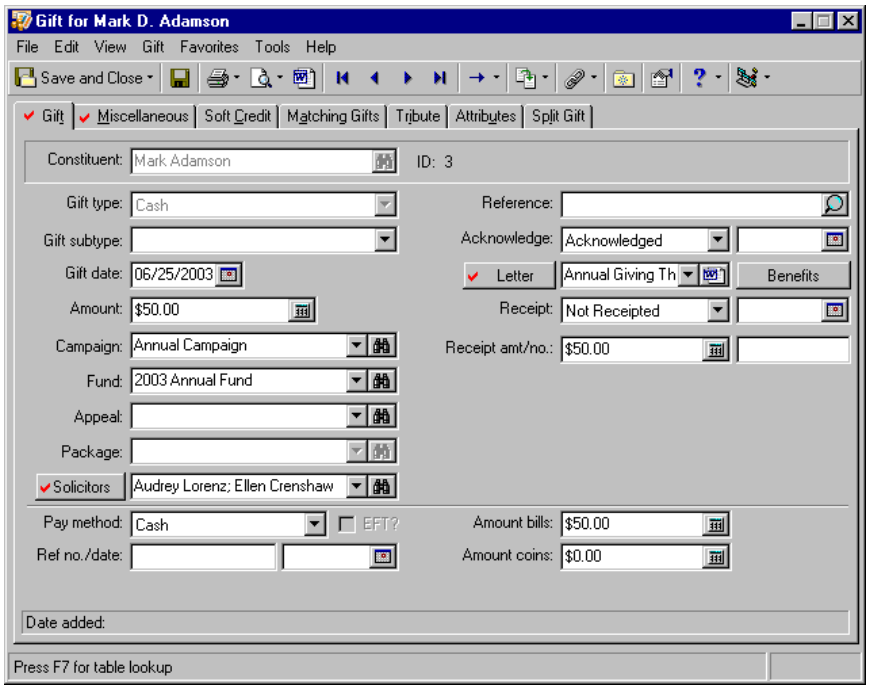
To copy predefined benefits from an appeal, membership, or event, you can click the **Load from** button on the Benefits screen. When you click **Load from**, a submenu appears listing the events, memberships, and appeals associated with this gift. The submenu contains only memberships, events, and appeals having default benefits. For information about adding default benefits to an appeal or package, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



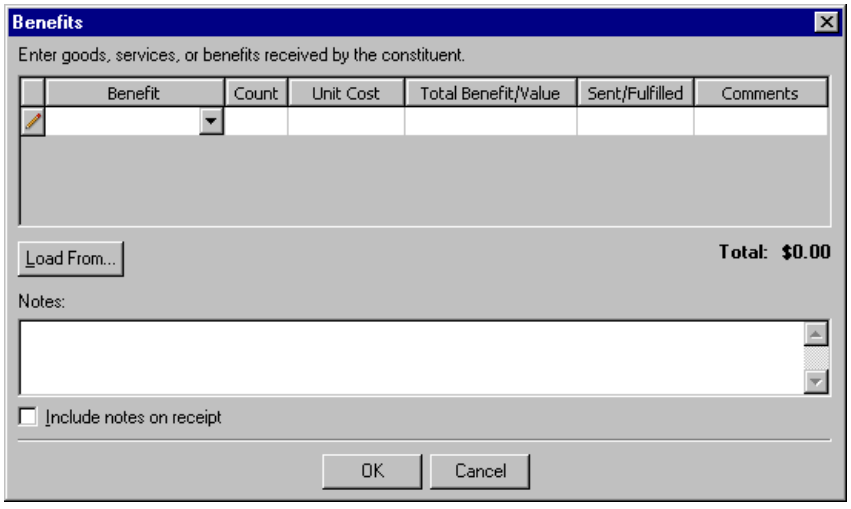
- **Adding default benefits to the current gift from a linked appeal, package, membership, or event**

  You can copy benefits from appeals, packages, memberships, or events linked to this gift.

  1. From a gift record, select the Gift tab. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.

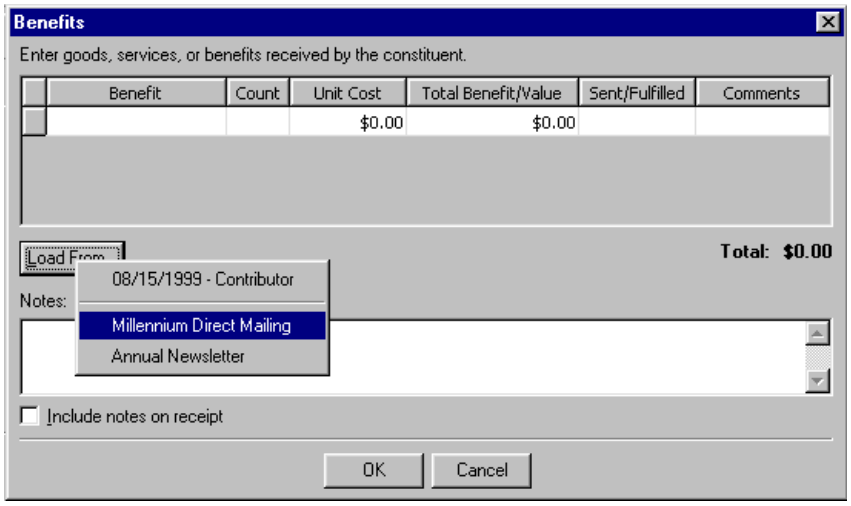


  2. Click **Benefits**. The Benefits screen appears.

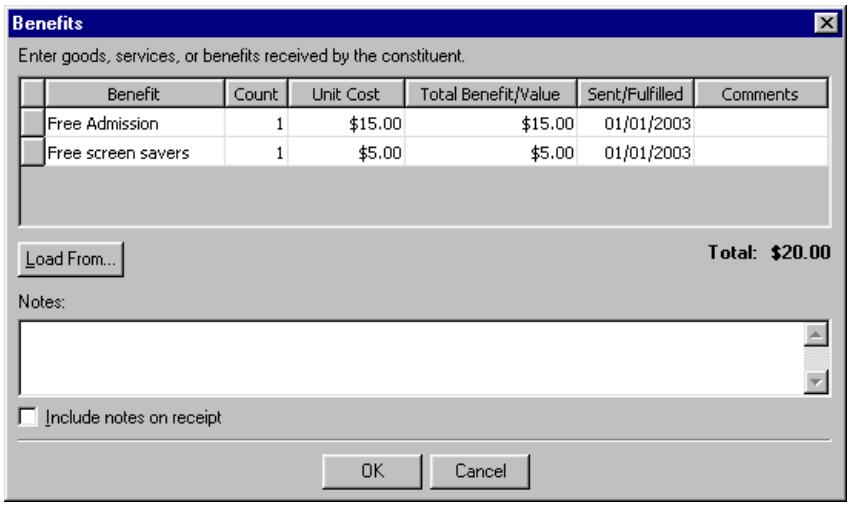


Note: If you did not link the gift to any appeals, packages, memberships, or events having default benefits, the program displays the message “This gift is not linked to any type of record with benefits.” For more information about linking gifts and benefits, see the *Membership Data Entry Guide* for memberships or the *Event Management Data Entry Guide* for events.

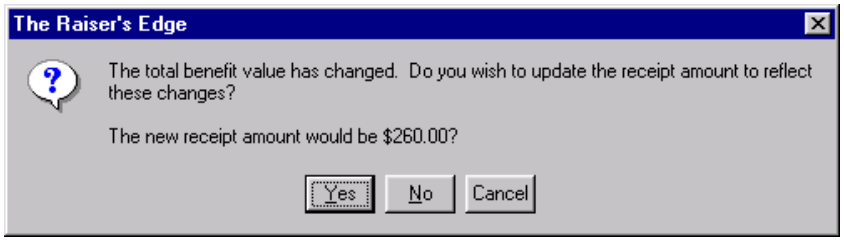
3. Click **Load From**. A submenu appears listing all the record types having default benefits linked to this gift record. In this case, two appeal records and a membership record with default benefits are linked to this gift record. Other record types containing default benefits are events and packages.



4. From the submenu, select the record from which you want to copy the benefits. The default benefits appear in the Benefits grid. You can edit these benefits as necessary.



5. Click **OK** to save the benefits and return to the Gift tab of the gift record. A message appears asking if you want to update the receipt amount because the total benefit value has changed.



6. To update the receipt amount on the Gift tab, click **Yes**. You return to the Gift tab of the gift record.
7. Click **Save and Close on the toolbar**.

Receipts

When a constituent donates a gift, you can use the **Receipt** field on a gift record to track whether you sent a receipt for a gift. In the **Receipt** field, you can select Receipted, Not Receipted, or Do Not Receipt. In the field to the right of the **Receipt** field, enter a reference date, such as the date you print the receipt. For example, if you handwrite a receipt for a gift, you can select Receipted in the **Receipt** field and enter the date you sent the receipt to the donor in the date field.

Note: If you enter a date in the receipt date field before you use *Mail* to print a receipt for a gift, the program still updates the receipt date field with the date you print the receipt in *Mail*.

If you use the Receipts mail task to print the receipts, select Not Receipted in the **Receipt** field and do not enter a reference date. After you create a receipt for the gift in *Mail*, the program can automatically update the **Receipt** field to Receipted and enter the date you print the receipt. When you select Receipted or Do Not Receipt in the **Receipt** field, *Mail* does not create a receipt for this gift. For more information about creating receipts in *Mail*, see the *Mail Guide*.

In the **Receipt amt** field, enter the monetary amount you want to print on the receipt.We recommend you enter the tax deductible portion of the gift. For example, if a constituent donates a gift and receives a coffee mug for the donation, the tax deductible portion of the gift is the gift amount minus the cost of the coffee mug.

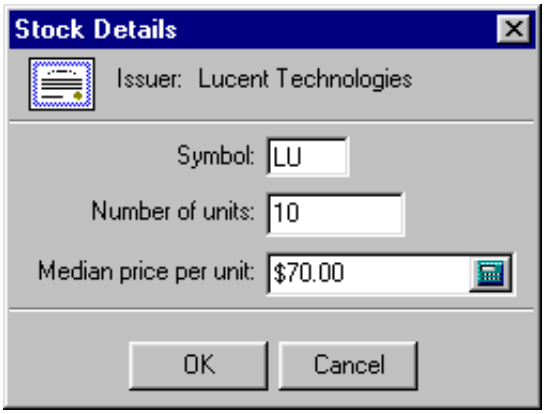
Note: If you want the **Receipt amt** field to automatically include the amount that is in the gift **Amount** field, you must set this as a rule in **Business Rules** in *Configuration*. From the **Gift options** in Business Rules, mark the **When changing 'gift amount' automatically update Receipt amount** checkbox. For more information on Business Rules, see the Configuration chapter of the *Configuration & Security Guide*.

In the **Receipt no.** field, enter a number for the receipt. If you print receipts using *Mail*, the program automatically adds the receipt number in this field when you print a receipt for this gift, even if you already entered a number in the **Receipt no.** field. For more information about receipt numbers, see the *Mail Guide*.

In *Configuration*, several business rules govern certain aspects of the **Receipt** field. When you change the gift amount, the program can automatically update the receipt amount. Also, when you save a gift, the program can ensure the receipt amount does not exceed the gift amount. To verify your settings in *Configuration*, click the **Business Rules** link on the Configuration page. When the Business Rules screen appears, select **Activity options** from the **Gift options** folder in the tree view. For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

Additional Options for Stock/Property Gifts

When you add a Stock/Property gift, the **Issuer** field appears below the **Receipt amt/no.** fields. In this field, you can enter a name to associate with the stock or property. The issuer is the company who issued the stock. For example, if a constituent gives your organization five shares of stock, enter the stock name in the **Issuer** field. You can click the **Details** button to add additional information about the transaction. When you click **Details**, the Stock Details screen appears.



On the Stock Details screen, enter the symbol for the stock, the number of units of stock you received, and the average price per unit. If you are adding a property gift, you can add information about the value of land.

Additional Options for Pledges and Recurring Gifts

When you add a Pledge gift, the **Send reminders** checkbox and **History** button appear below the **Receipt amt/no.** fields. If you want to send pledge reminders to the donor of a pledge gift, you must mark the **Send reminders** checkbox. The **History** button appears so you can view a list of the pledge reminders sent for this gift.

Note: The **Status** field is available if you use the optional module *Electronic Funds Transfer*. For more information about *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

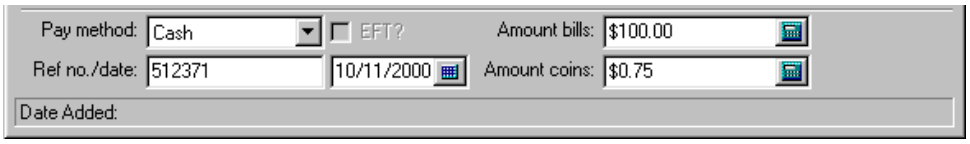
When you add a pledge or recurring gift, the **Status** field appears below the **Receipt amt/no.** fields and the **Schedule** button appears to the right of the **Amount** field. Your entry in the **Status** field determines whether gift records for pledge installments or recurring gift transactions can be applied to the gift record for the pledge or recurring gift. In the **Status** field, you can select Active, Held, Terminated, or Completed. When you add a gift record for a pledge or recurring gift, you need to click the **Schedule** button to define the payment schedule for the gift. For more information about gift records for pledge gifts, see “Pledges” on page 137. For more information about recurring gifts, see “Recurring Gifts” on page 193.

Selecting the Payment Method

Note: The payment method fields do not affect the GL Distribution. For more information about GL Distributions, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

In the **Pay method** field at the bottom of the Gift tab, you need to select the method the constituent used to donate the gift. You can select Cash, Personal Check, Business Check, Credit Card, Direct Debit, or Other. The fields associated with the **Pay method** field change depending on the payment method you select.

Pay Method: Cash



Note: The payment method Cash can be any type of currency, including foreign currency. You can select **Gift**, **Currency Exchange** from the menu bar to convert the gift from a foreign currency to your monetary system.

When you select Cash in the **Pay method** field, you can enter the amount of money you received in bills and coins in the **Amount bills** and **Amount coins** fields. In the **Ref no./date** fields, enter any special codes and dates your organization uses to track currency gifts. For example, you can use this field to record the deposit ticket number and deposit date for currency gifts.

Pay Method: Personal Check and Business Check

Tip: When you add the check date, you can click the calendar to select a date.

For gifts donated in the form of a personal or business check, you can record the check number, check date, and the name of the bank where the account is based. To select a bank, click the down-arrow in the **Bank** field and select from the list. This list contains all banks, branches, and account numbers entered on the donor's constituent record.

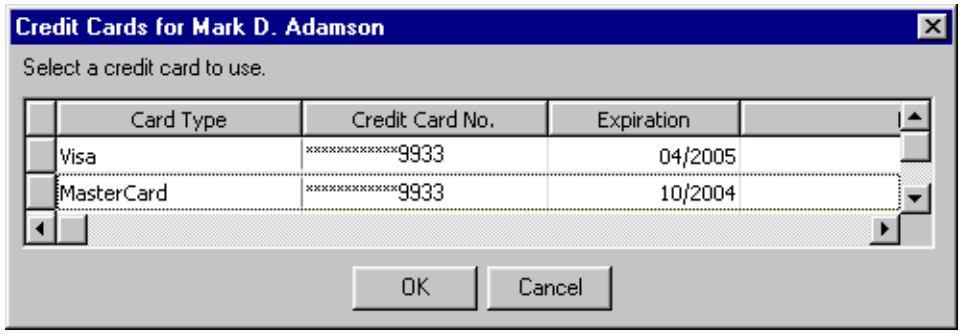
To add a new bank or financial institution for the constituent donating the gift, click the new bank button in the **Bank** field. For more information about adding a new bank to a constituent record, see the Configuration chapter of the *Configuration & Security Guide*.

Pay Method: Credit Card

Note: The **Card exp.** field formats the date as mm/yy or mm/yyyy depending on the settings you select on the Date tab of the **Regional Properties** option in the *Windows* Control Panel.

When a constituent donates a gift with a credit card, enter the credit card type, cardholder's name, number, and expiration date in the **Card type**, **Cardholder**, and **Card no./exp** fields.

When you place the cursor in the **Card type** field, press **F7** on your keyboard to view the Credit Card screen. The Credit Card screen appears so you can select from the list of all credit cards entered on the donor's constituent record.



To select the card you want, click the gray box on the left side of the row containing the credit card you want to select. This highlights the row containing the credit card you want to select. After you select the appropriate credit card, click **OK**. The program enters the card type, number, and expiration date in the appropriate fields on the Gift tab. If you authorized the credit card with a processing agency, enter the authorization code in the **Auth code.** field.

When a constituent donates a credit card gift, you can process the gift if you have the optional module *Electronic Funds Transfer*. To process the gift using *Electronic Funds Transfer*, mark the **EFT?** checkbox. For more information about *Electronic Funds Transfer* transactions, see the *Electronic Funds Transfer (EFT) Guide*.

The Raiser's Edge requires Internet access to connect to the Blackbaud *Payment Service*. If ***The Raiser's Edge*** cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited recurring credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, ***The Raiser's Edge*** stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** field displays a masked credit card number, with only the last four digits visible.

For one-time credit card transactions only, in the **Credit Card No.** field, ***The Raiser's Edge*** displays a masked credit card number, with only the last four digits visible. The program stores only the last four digits and sends no information to the Blackbaud *Payment Service*.

Pay Method: Direct Debit

If a constituent donates a gift through a direct debit of their account, you can record the bank or financial institution from which you will receive the direct debit; a reference number; and a reference date. To select a bank or financial institution, click the arrow in the **Bank** field and select from the list. This list contains all banks or financial institutions, branches, and account numbers entered on the donor's constituent record.

Note: The **Received** checkbox is not available for pledges or recurring gifts.

To add a new bank or financial institution for the constituent donating the gift, click the new bank button in the **Bank** field. For more information about adding a new bank or financial institution, see the Configuration chapter of the *Configuration & Security Guide*. After you receive the direct debit from the bank, mark the **Received** checkbox.

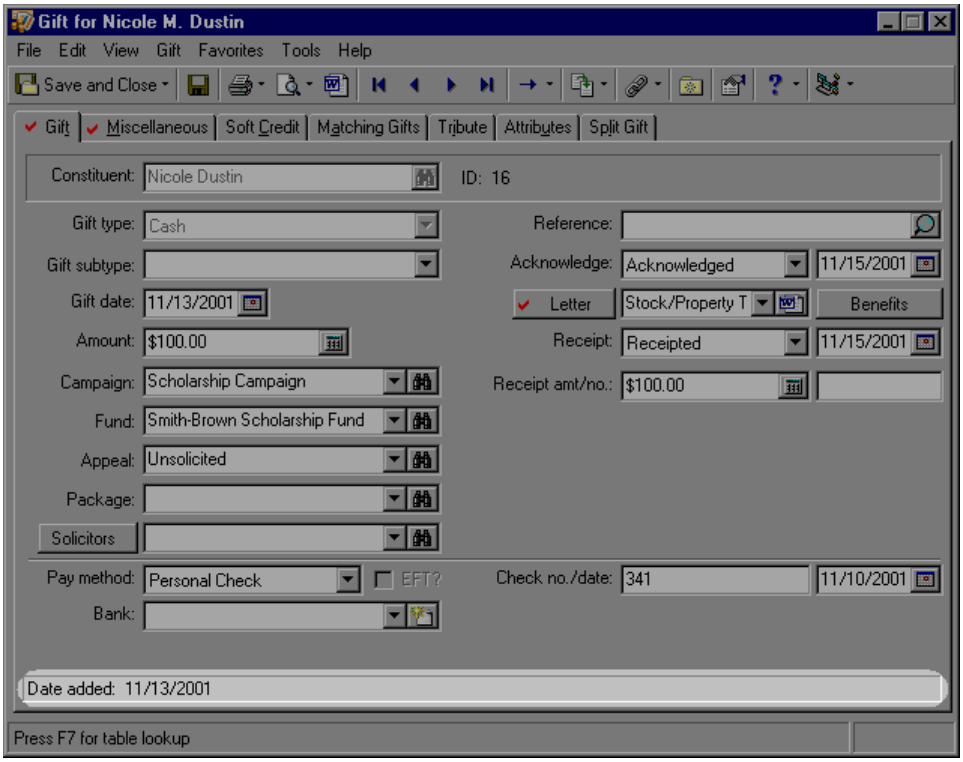
When a constituent donates a direct debit gift, you can process the gift if you have the optional module *Electronic Funds Transfer*. To process the gift using *Electronic Funds Transfer*, mark the **EFT?** checkbox. When you have *Electronic Funds Transfer*, you can click the **Pre-notify** button to schedule a prenotification transaction prior to the actual financial transaction. For more information about *Electronic Funds Transfer* transactions and prenotifications, see the *Electronic Funds Transfer (EFT) Guide*.

Pay Method: Other

When a payment method does not fit any of the other payment categories, select Other. For example, if your organization receives a Gift-in-Kind of computers, you can select Other as the payment type. In the **Ref no./date** fields, enter any reference information your organization uses to track gifts with this method of payment.

Status Bar

At the bottom of a gift record, the status bar displays a variety of information about the gift. The information in the status bar depends on your selection in the **Gift type** on a gift record.



Status Bar for Cash, Gift-in-Kind, Other, and Recurring Gifts

Note: The **Date Added** is not affected by the date you enter in the **Gift date** field.

For gifts classified as Cash, Gift-in-Kind, Recurring Gift, and Other, the program displays in the status bar the date you added the gift record to the database.

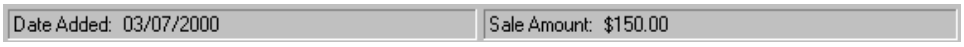
Status Bar for Pledges and Matching Gift Pledges

In the first panel of the Status Bar for pledges and matching gift pledges, the program displays the date you added the gift record to the database. The second panel displays the balance due for the pledge or matching gift pledge. The balance accounts for any write-offs made to the pledge. For example, a $175 pledge is scheduled to be paid. If you write off $75, the balance section of the Status Bar displays $100 because you still expect the constituent to pay the remaining amount.

Status Bar for Stock/Property Gifts

Note: To sell a Stock/Property gift, select **Gift**, **Sell Stock/Property** from the menu bar. For more information, see “Adding a Stock/Property gift” on page 77.

In the first panel of the Status Bar for stock/property gifts, the program displays the date you add the gift record to the database. The second panel displays the **Sale Amount** for the stock/property gift. If you have not sold the stock property gift, a second panel does not appear in the Status Bar.

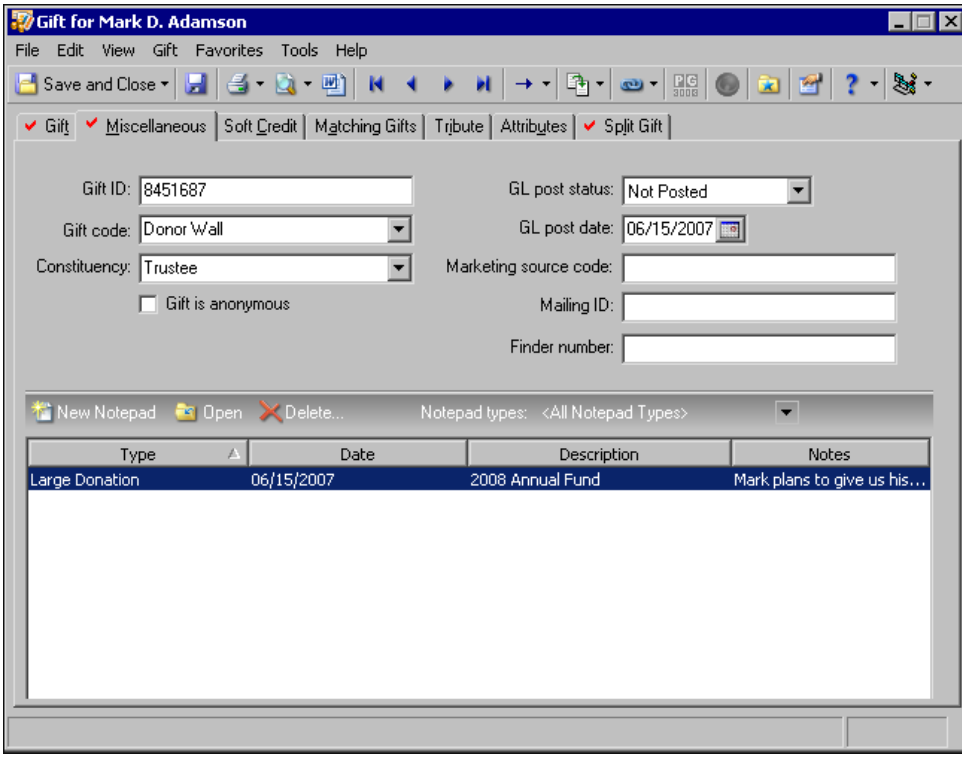


Miscellaneous Tab

Note: The **GL post status** and **GL post date** fields always appear on the Miscellaneous tab. If you do not have Blackbaud's ***General Ledger***, you can use these to track your own posting information.

On the Miscellaneous tab, you can record a variety of gift information, such as a unique identification number or a gift code. The Miscellaneous tab also contains fields that track the posting status of the gift if you have Blackbaud's ***General Ledger*** and a Notes grid where you can add specific information about a gift.

Note:



Coding a Gift

There are several ways you can code a gift to make it easy to locate and to explain why it is in your database.

Gift ID

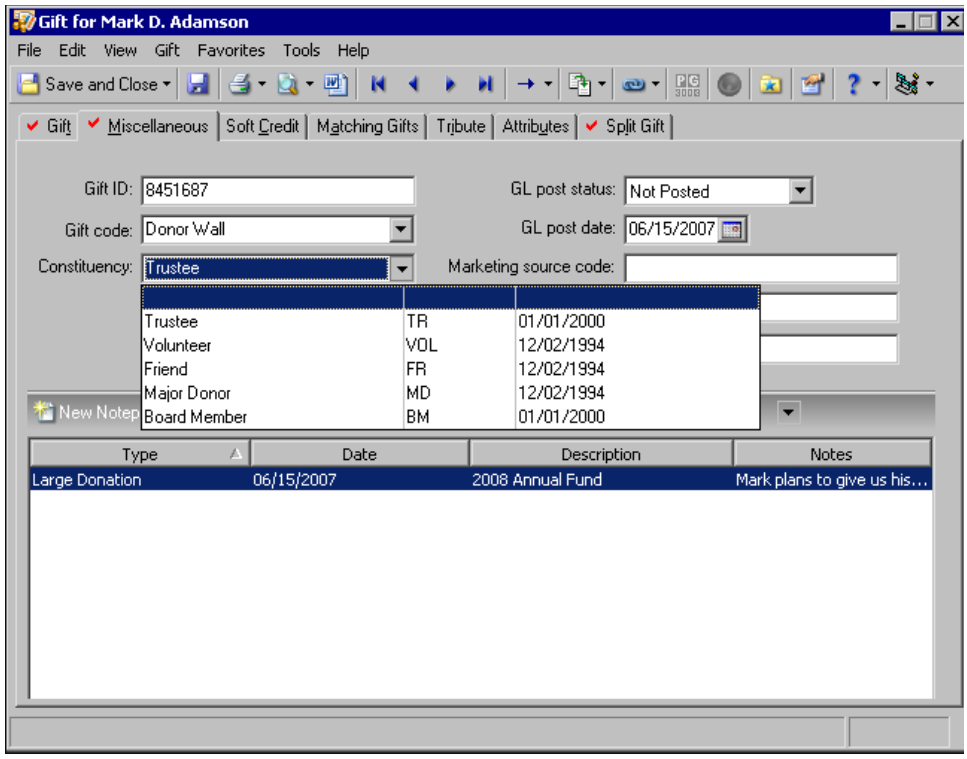
You can assign a unique number, called a **Gift ID**, to each gift in the database. The **Gift ID** can contain both alphabetical and numerical characters and can have a maximum length of 50 characters. ***The Raiser's Edge*** automatically creates a **Gift ID** when you save the gift record. For more information about automatically generating **Gift IDs**, see the Configuration chapter of the *Configuration & Security Guide*.

Gift Code

You can enter a **Gift code** to track various characteristics about a gift. For example, if your organization recognizes certain constituents for their gifts by placing their names on a plaque, you can add a gift code of “Donor Wall” to gifts that meet the requirements. Because you are tracking whether a constituent should be included on the donor wall, you can use this information to create a query or a mailing for individuals who qualify for the donor wall.

Constituent Codes for Gifts

We strongly recommend you add a constituent code to every gift in the database. A constituent code identifies why the constituent donated the gift to your organization. For example, a constituent may give a donation because she is a board member. However, this constituent also regularly volunteers for your organization. In the **Constituency** field, you can select Board Member so you know the constituent donated the gift because of her Board Member status. When you click the arrow in the **Constituency** field, the program displays a list of all the constituent codes entered on the Bio 2 tab or Org 2 tab of the donor’s constituent record.



Note: Although a gift may not fall within the start and end dates of the constituent code, you can still select the constituent code for the gift.

The **Constituency** list displays the description, ID, and start and end dates for the constituent code. When you select a code from the list, the description appears in the **Constituency** field. If the constituent code you want to assign does not appear in the list, you can add additional constituent codes for the donor in the **Constituent Code** grid on the Bio 2 tab or Org 2 tab of the donor’s constituent record. For more information about adding constituent codes to the Bio 2 tab or Org 2 tab, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

Posting Status

The program uses the **GL post status** field to determine whether a gift has been posted to Blackbaud's ***General Ledger***. In the **GL post status** field, you can select from Posted, Not Posted, and Do Not Post. If you select Posted and save the gift, all fields on the gift record are disabled. To make modifications to a gift after it has been posted, you can adjust the gift by selecting **Gift**, **Adjust** from the menu bar. For more information about adjusting a gift, see "Adjusting a Gift" on page 91.

Note: If "Posted" or "Do Not Post" does not appear in the **GL post status** field, you do not have security rights to select these options. If you want to select one of these options, see your Supervisor. For more information about security, see the *Configuration & Security Guide*.

If you interface with Blackbaud's ***General Ledger***, you can use the **Post to GL** option in *Administration* to post gifts. To use the **Post to GL** option, select Not Posted in the **GL post status** field. When the program posts the gift to Blackbaud's ***General Ledger***, it updates the **GL post status** field to Posted. If you select Posted or Do Not Post in the **GL post status** field, the program does not post the gift to ***General Ledger***.

In the **GL post date** field, enter a date corresponding to the post status you selected. This date determines which accounting period the gift posts to on the specified account or project in ***General Ledger***. If you select Not Posted in the **GL post status** field, today's date defaults in the required **GL post date** field. You can edit the date.

The **GL post status** and **GL post date** fields always appear on the Miscellaneous tab. If you do not have Blackbaud's ***General Ledger***, you can use these to track your own posting information. For more information about the complete process of posting to ***General Ledger***, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

Anonymous Gifts

If a constituent requests to donate a gift anonymously, mark the **Gift is anonymous** checkbox. The program automatically marks this checkbox when you mark the **Normally gives gifts anonymously** checkbox on the Bio 1 or Org 1 tab of a constituent record. When you print reports, you can select the format used to print anonymous gifts. For example, you can choose to print or omit the constituent's name from reports. For more information about printing anonymous gifts in reports, see the appropriate reports manual for the report category you are using.

Marketing Segment and Marketing Source Code

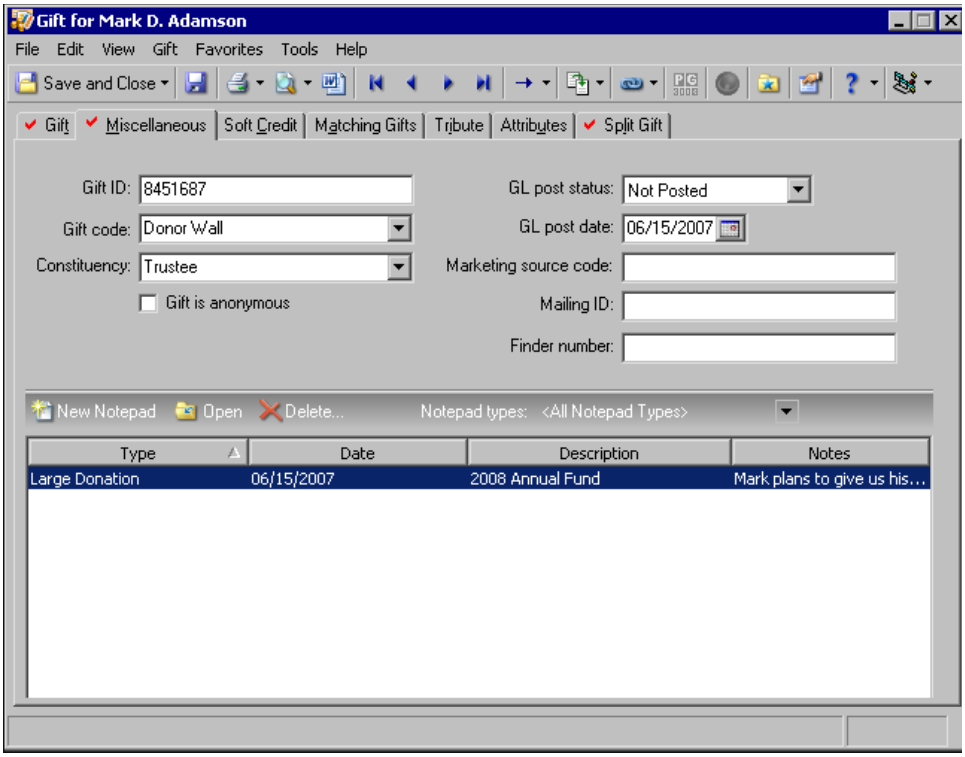
The **Marketing Segment**, **Marketing Source Code**, **Mailing ID**, and **Finder Number** columns capture information related to your organization's direct marketing fundraising initiatives. In the **Marketing Segment** column, for each appeal, you can enter the marketing segment (target group) to which the constituent belongs. Marketing Segmentation helps the effectiveness of your fundraising by enabling you to target your best prospects with the appropriate packages (mailings for example). The main reason to use segmentation is that different groups of donors will have different responses to appeal packages. Targeting specific groups enables you to increase the effectiveness of your direct marketing.

In the **Marketing Source Code** column, for each appeal, you can enter the code associated with a package. This code can be a series of letters and/or numbers affixed to an outgoing initiative that identifies such things as the list, offer, package, segment, and media. In the **Mailing ID** column, you can enter a number that identifies the specific mailing that generated the gift. In the **Finder Number** column, you can enter a number to identify a person in the mailing.

The **Marketing Segment**, **Marketing Source Code**, **Mailing ID**, and **Finder Number** columns can be used to receive data from ***Blackbaud Direct Marketing***. For information about ***Blackbaud Direct Marketing***, see the ***Blackbaud Direct Marketing*** documentation or contact your account representative.

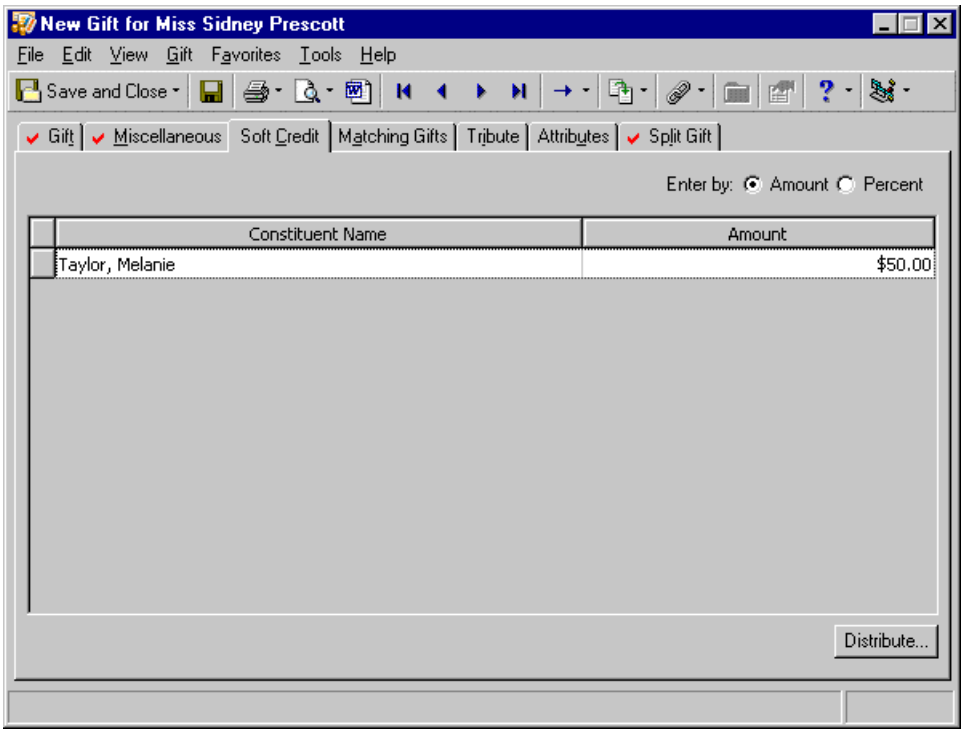
Notes

On the lower half of the Miscellaneous tab, you can add notes about the gift you are adding. For example, if a constituent donates a large gift, you can add a note concerning how you were able to convince the constituent to donate the gift. You can add notes in many areas of ***The Raiser's Edge*** using the same method. For more information about adding notes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*.



Soft Credit Tab

A soft credit allows more than one constituent to share credit for a single gift without adding duplicate gift records in the database. On reports and mailings, you determine whether the donor, the soft credit recipient, or both should receive credit for the gift. When you soft credit constituents for a gift, you can decide whether to split the credit evenly among all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution. You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in your database. A single constituent cannot be soft credited with an amount greater than the gift amount.

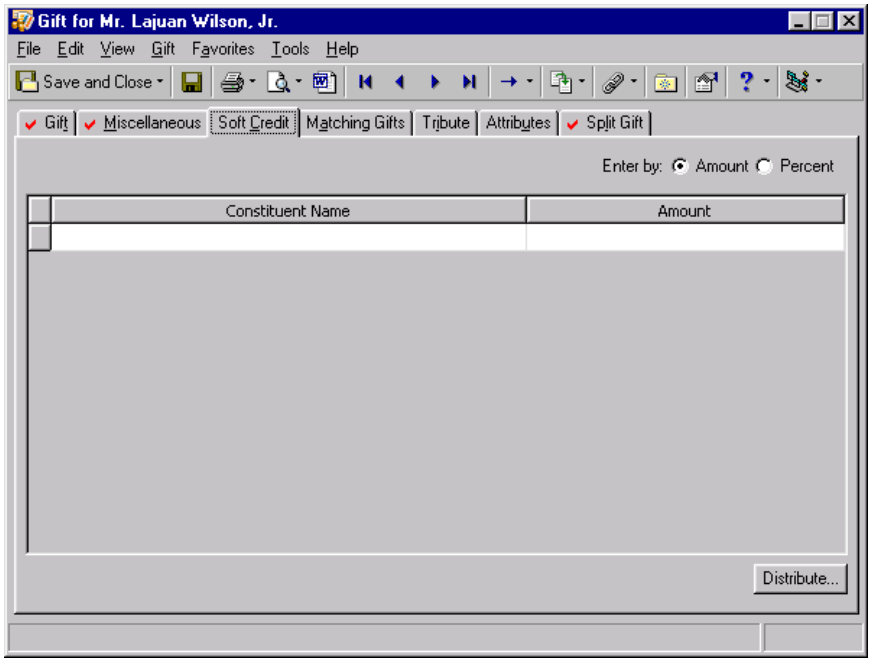


- **Adding a soft credit to a gift record**

Scenario: Lajuan and Renee Wilson are married and have separate constituent records in your database. The couple sent your organization a single check for $750 and each wants to receive full credit for the gift. If you add the $750 gift to both Lajuan and Renee's record, you will add a duplicate gift in your database and reports will show you have an extra $750. To credit both constituents for the gift, without duplicating the gift, use the Soft Credit tab to credit additional donors for a gift. In this scenario, you already entered the gift record for Lajuan Wilson. You need to soft credit Renee Wilson for this $750 gift.

Warning: When you change the gift amount entered on a gift record, the soft credit amount assigned on the Soft Credit tab does not change. If you change the gift amount, you need to verify the soft credits assigned to other constituents are correct for the current gift amount.

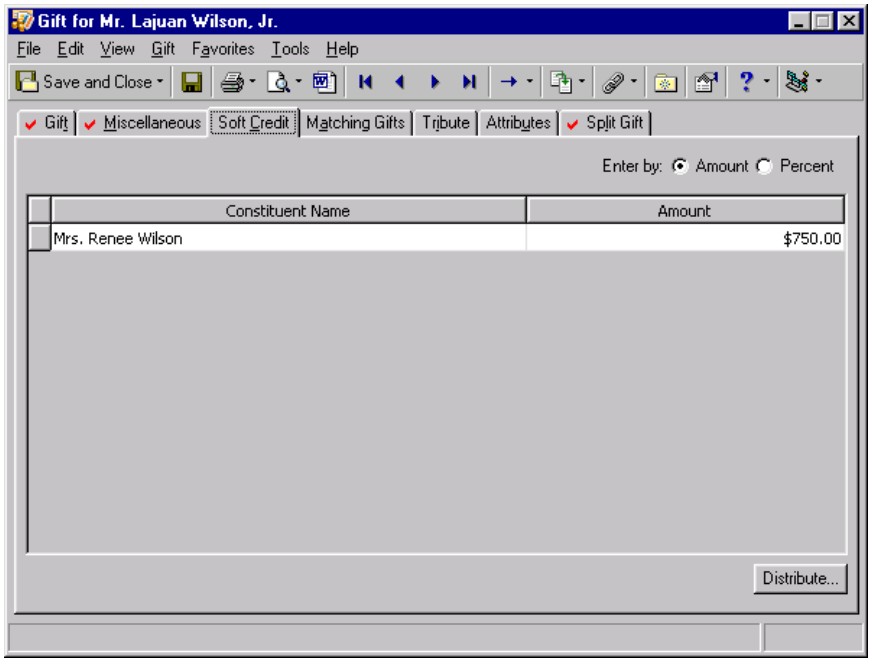
1. From Lajuan's gift record, select the Soft Credit tab. For more information about opening a gift record, see "Accessing a Gift Record" on page 7.



2. In the **Enter by** field, select whether you want to credit recipients with an amount or percent of the gift. For Lajuan and Renee's gift, select **Amount**.
3. Click in the first row of the **Constituent Name** column. The binoculars appear. Click the binoculars to search for Renee Wilson in the database. When you locate Renee Wilson, the program enters her name in the first row of the **Constituent Name** column.

Note: When soft crediting multiple constituents, you can use the **Distribute** button to assign full credit to each constituent or split the credit evenly among all soft credit recipients. When you use the **Distribute** button, you do not need to enter any values in the **Amount** or **Percent** column. The program inserts these values when you click **Distribute**.

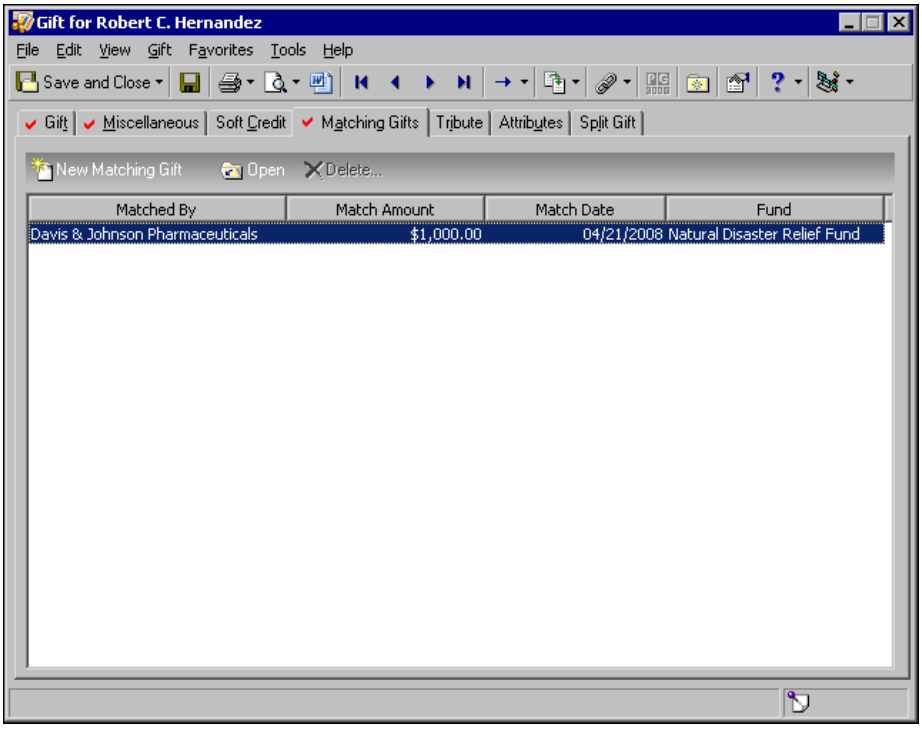
4. In the **Amount** column, enter the amount $750 to credit Renee for the entire amount of the gift. Now, Lajuan and Renee Wilson both receive full credit for the gift without duplicating a gift in the database.



5. Click **Save and Close** on the toolbar.

Matching Gifts Tab

You can use the Matching Gifts tab to add or view gifts donated by a business matching a constituent's donation. For example, Davis & Johnson Pharmaceuticals pledged to match every gift their employees donate to your organization with a matching factor of 1 and a maximum donation of $1,000 per employee. Carlos Hernandez, a Davis & Johnson Pharmaceuticals employee, donated a gift of $1,000. You can create a matching gift for Davis & Johnson Pharmaceuticals from the Matching Gifts tab of Carlos Hernandez's gift record. When you save Carlos's gift, the program automatically creates a matching gift on Davis & Johnson Pharmaceuticals's constituent record.

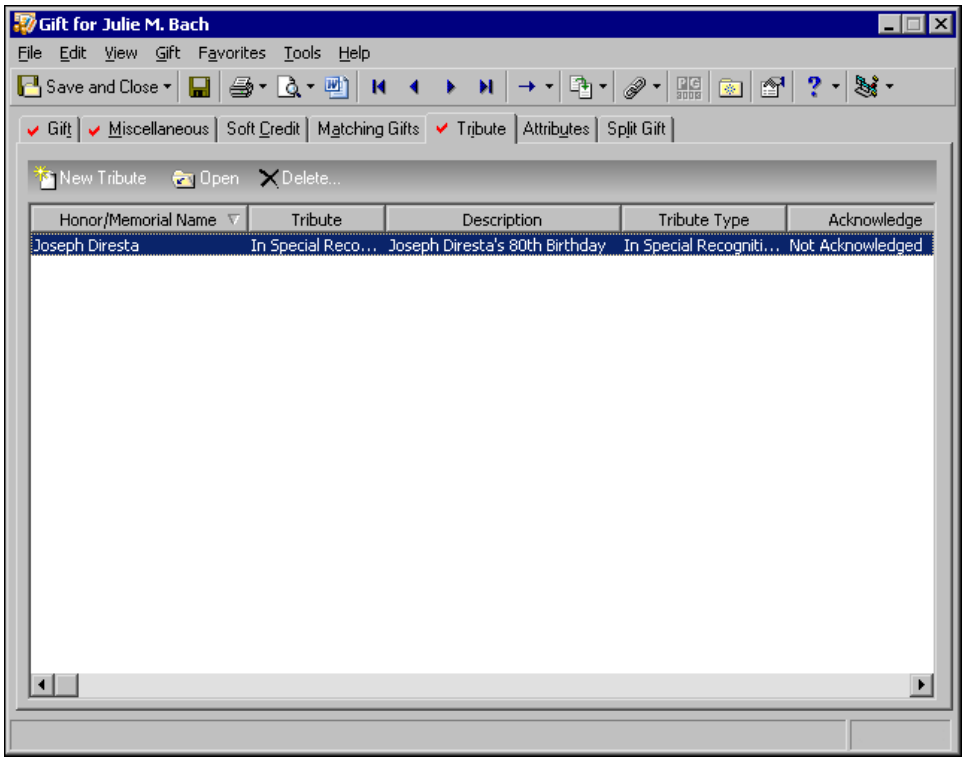


An entire chapter of the *Gift Records Guide* is devoted to adding and paying matching gift pledges. For more information, see "Matching Gifts" on page 247.

Tribute Tab

Warning: Before you begin adding tribute gifts, you must set up the tribute on the Honor/Memorial tab of the honoree's constituent record. For information about creating a new tribute, see the *Tribute Data Entry Guide*.

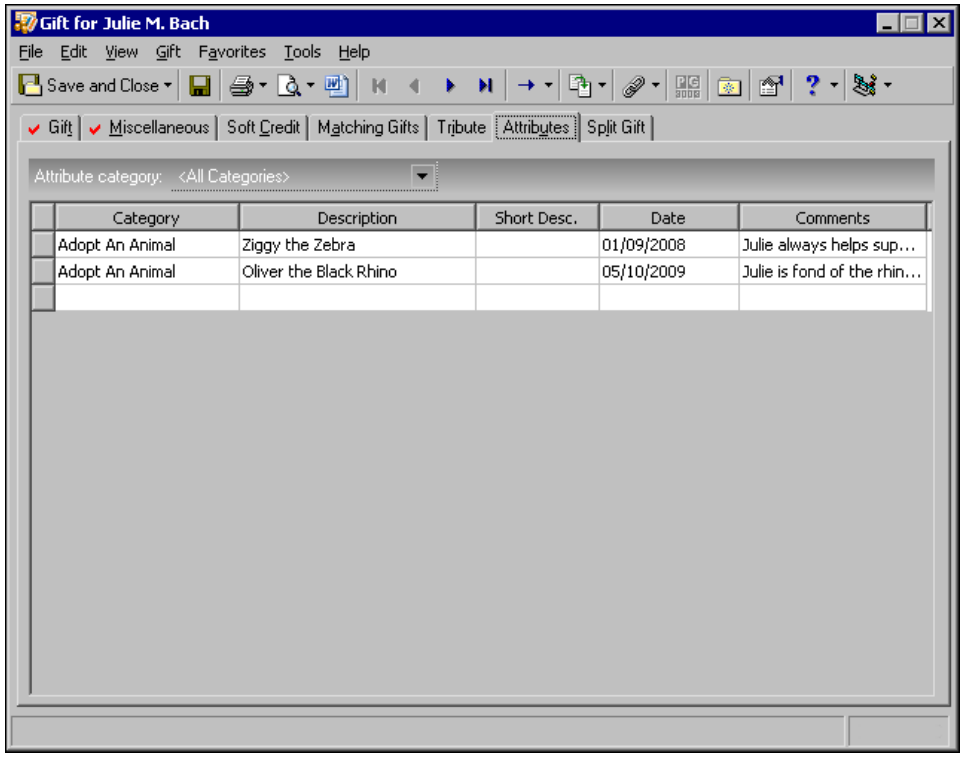
If you have the optional module *Honor/Memorial Tracking*, you can track detailed information about donations given in honor, memory, or celebration of an individual or organization. With *Honor/Memorial Tracking*, you can use the Tribute tab on a gift record to apply a gift to a tribute. A tribute explains the reason gifts are being donated to your organization on behalf of an honor/memorial constituent. For example, your organization is a church and Joseph Diresta, a member of your congregation, is being honored on his eightieth birthday. You can set up a tribute to Joseph Diresta on the Honor/Memorial tab of his constituent record. When gifts are donated to your church in special recognition of Joseph Diresta, you can apply the gifts to Joseph Diresta's tribute using the Tribute tab on a gift record.



An entire gift book is devoted to entering honor/memorial gifts. For information about designating a gift to an honor/memorial constituent, see the *Tribute Gifts Guide*.

Attributes Tab

Throughout ***The Raiser's Edge***, you can add attributes to track information specific to your organization. On a gift record, you can use the Attributes tab to store additional information about a gift. For example, your organization is a zoo with a program allowing individuals to adopt an animal for a day. When a constituent donates a gift to adopt an animal, such as Ziggy the Zebra, you can add the name of the animal and the adoption date as an attribute on the gift record.

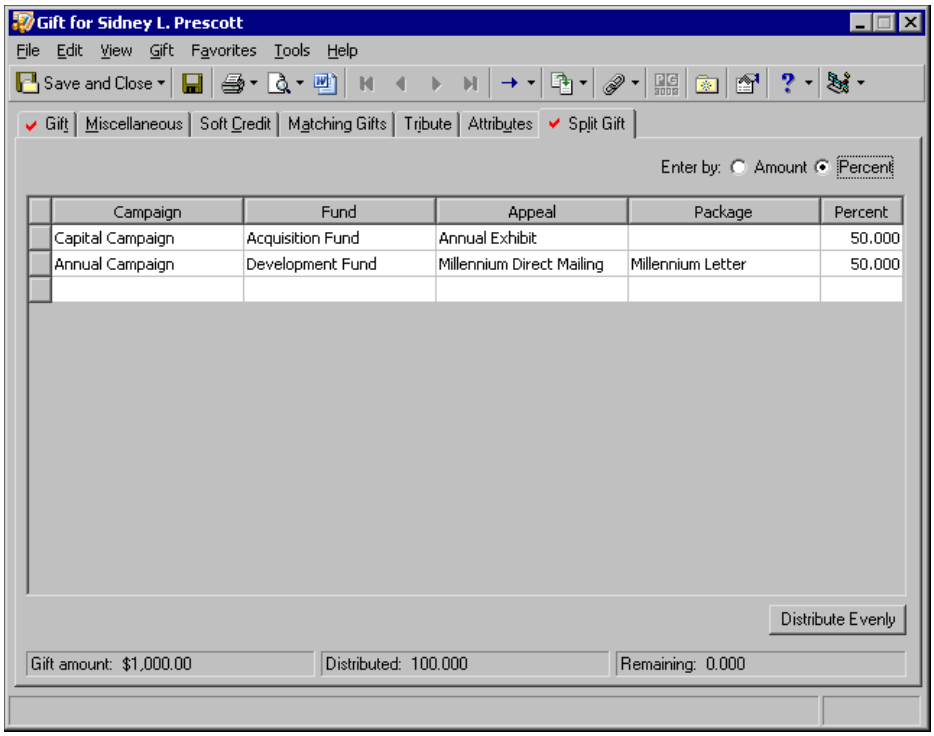


Later, when Ziggy the Zebra becomes a mother, you can create a query of all individuals who adopted Ziggy and send them a birth announcement.

You add gift attributes using the same method you use to add an attribute on a constituent record. For more information about adding an attribute, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*.

Split Gift Tab

From the Split Gift tab, you can split a gift among multiple campaigns, funds, appeals, or packages. When you split a gift, you can specify an amount or percent of the gift going to each campaign, fund, appeal, and package. After you split a gift, the program displays the campaigns, funds, appeals, and packages you select on the Split Gift tab in the corresponding fields on the Gift tab. Then, the program disables the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab.



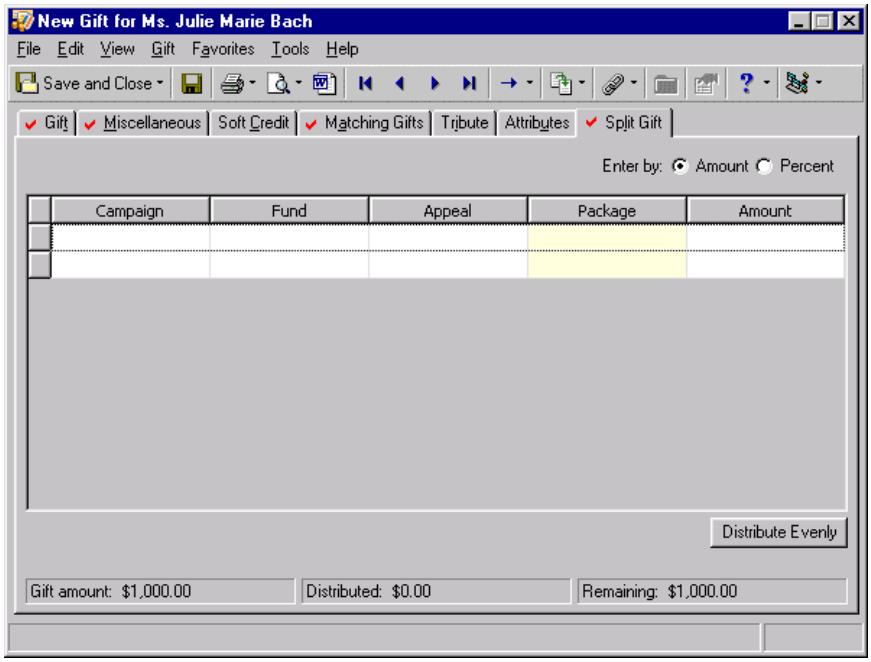
- **Splitting a gift between two funds**

  This procedure explains how to split a gift between two funds. You can also use these principles to split a gift among multiple campaigns, appeals, and packages because the methods are the same.

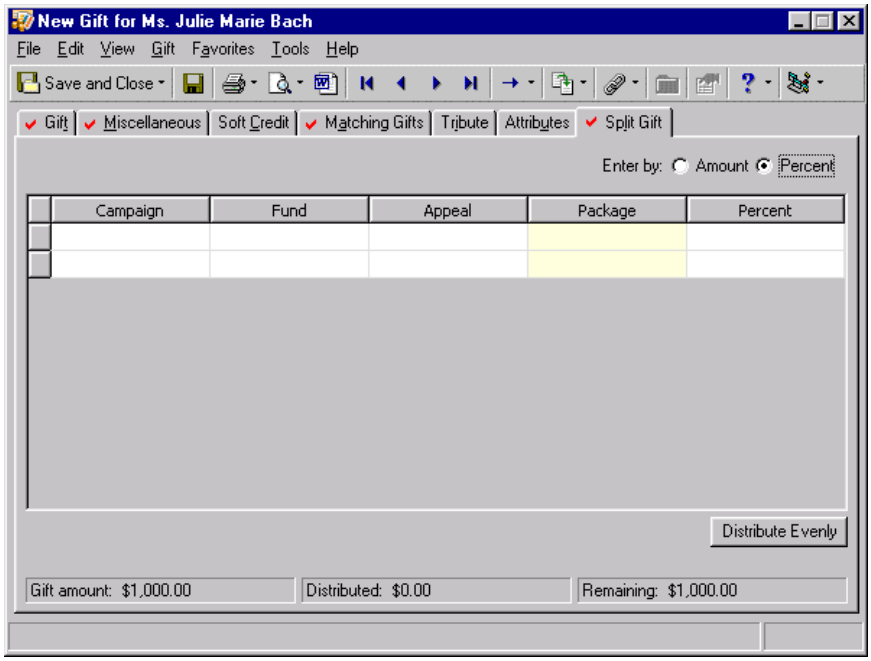
  Scenario: In response to your Annual Newsletter appeal, a constituent sent a gift for the Capital Campaign. This constituent requests her gift be split evenly between your Acquisition and Building funds. To split the gift as the constituent requests, enter the campaign, fund, and appeal information on the Split Gift tab. After you enter the information on the Split Gift tab, the program displays the information in the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab and disables those fields.

Note: If you already entered a campaign, fund, appeal, and/or package on the Gift tab, this information appears in the first row of the Split Gift grid.

1. From a gift record, select the Split Gift tab. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.



2. In the **Enter by** field, select whether to split the gift based on the amount or percent of the gift. For this example, select **Percent**. The **Amount** column changes to the **Percent** column.



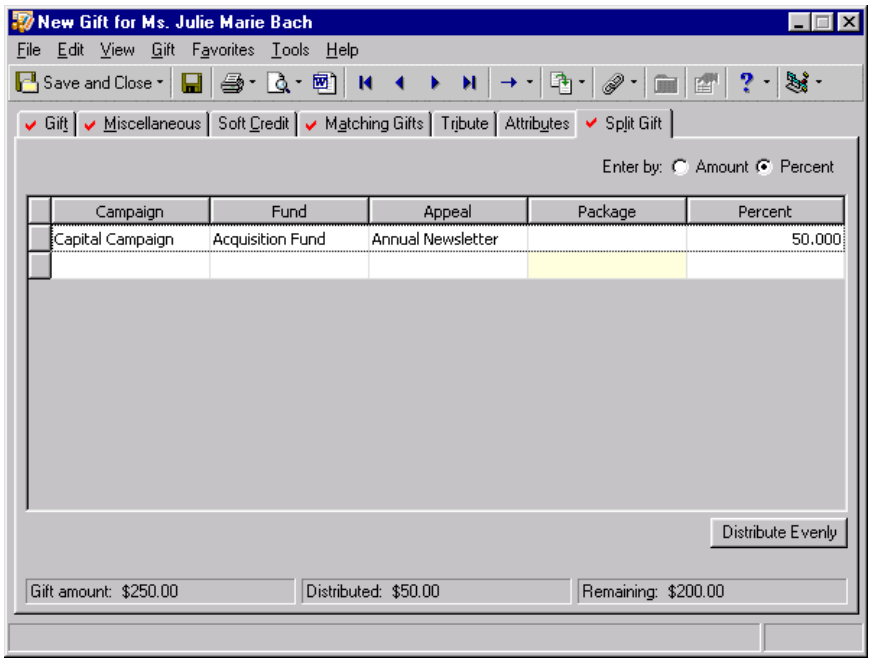
Note: We strongly recommend searching for the record or selecting from the list to avoid adding duplicate records.

3. In the first row of the **Campaign** column, select “Capital Campaign”.
4. In the first row of the **Fund** column, select “Acquisition Fund”.
5. In the first row of the **Appeal** column, select “Annual Newsletter”.

6. In the first row of the **Package** column, select the package you want to associate with the gift. For this example, the appeal has not been divided into packages so you can leave the **Package** column blank. Packages are a way to further define the appeal. For example, you may have a color newsletter you send to major donors and a black and white newsletter you send to prospective donors.

Tip: It is not necessary to enter a $ or % character in the **Amount** or **Percent** column. When you leave this column, the program automatically formats your entry.

7. In the **Percent** column, enter "50" to distribute 50% of the gift to the Acquisition Fund.



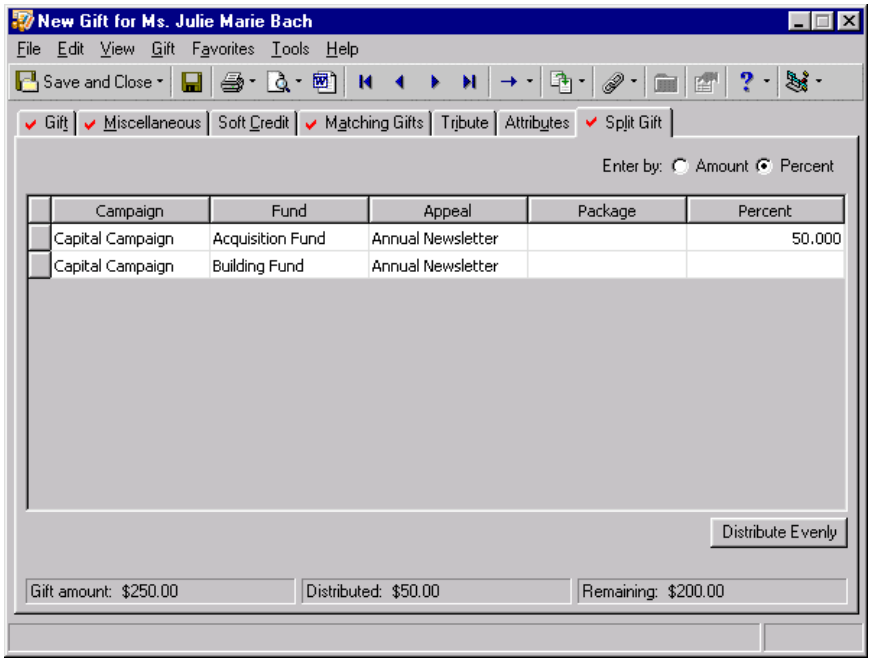
8. With the cursor in the **Percent** column, press the **TAB** key to begin the second row in the Split Gift grid.

Warning: If you do not enter the Capital Campaign and the Annual Newsletter appeal again in the second row, the Capital Campaign and the Annual Newsletter appeal are credited with only 50% of the gift because that is the distribution you designated in the first row of the Split Gift grid.

9. In the second row of the **Campaign** column, select "Capital Campaign". It is necessary to enter the Capital Campaign on the second row so the campaign is credited with 100% of the gift amount.
10. In the second row of the **Fund** column, select "Building Fund".

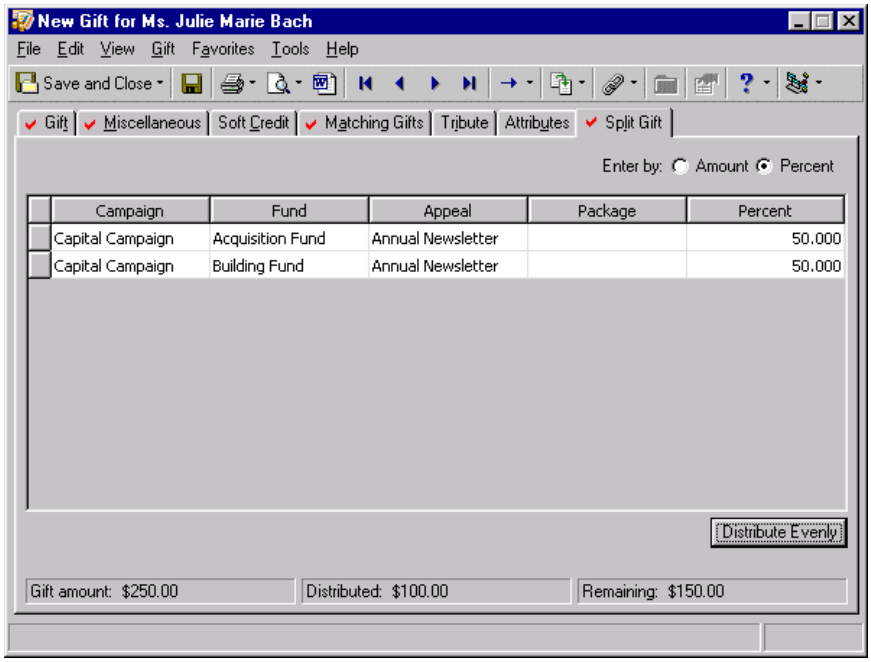
Note: When information exists on the Split Gift tab, the **Campaign**, **Fund**, **Appeal**, and **Package** fields are disabled on the Gift tab. If you need to enable these fields, delete all but one row in the Split Gift grid on the Split Gift tab.

11. In the second row of the **Appeal** column, select “Annual Newsletter”. It is necessary to enter the Annual Newsletter appeal on the second row so it is credited with 100% of the gift amount.



Tip: If you use the **Distribute Evenly** button, it is not necessary to enter any numbers in the **Amount** or **Percent** column. Simply tab through the **Amount** or **Percent** column and enter the name of the next campaign in the second row of the **Campaign** column.

12. Click **Distribute Evenly** to automatically divide the gift amount evenly between the funds you selected. If you do not want to evenly distribute the gift, you can enter a distribution in the **Amount** or **Percent** column.



13. To save the information and close the gift record, click **Save and Close** on the toolbar.

Working with Gift Records

Now that you understand the tabs and options on a gift record, you are ready to begin adding gift records to the database. The section explains how to add Cash, Gift-in-Kind, and Stock/Property gifts.

Cash Gifts

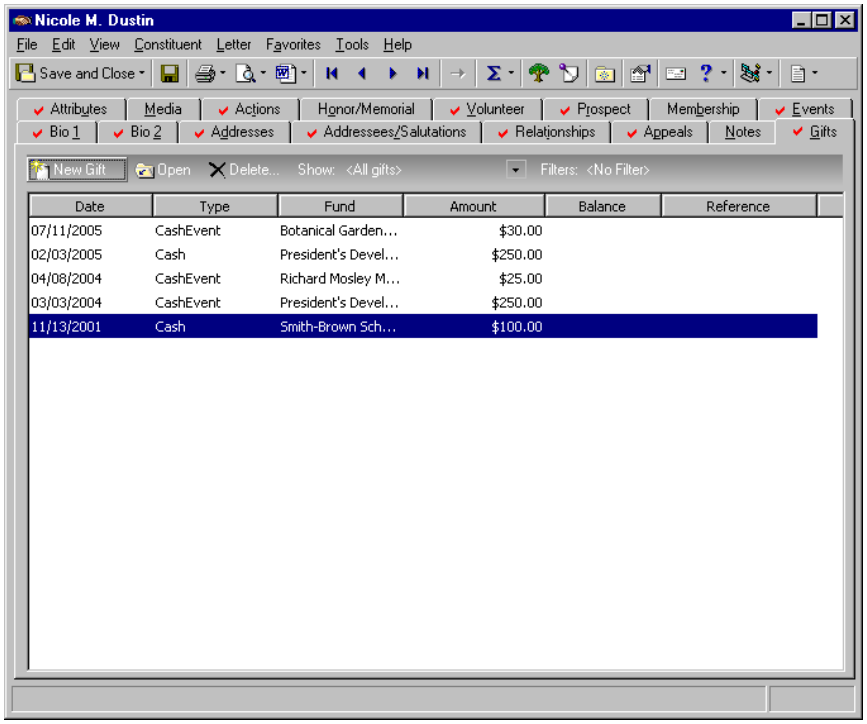
Cash gifts are gifts paid by any form of cash including currency, credit card, personal or business check, or direct debit.

Adding a Cash gift

Scenario: On 10/09/2004, your organization received a check for $100 from Nicole Dustin who is a constituent in your database. Nicole donated her gift in response to your Annual Mailing which is part of your Annual Campaign. Angela Diresta and Anne Sinclair are the solicitors responsible for acquiring the gift and you should credit 30 and 70 percent of the gift to each, respectively.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

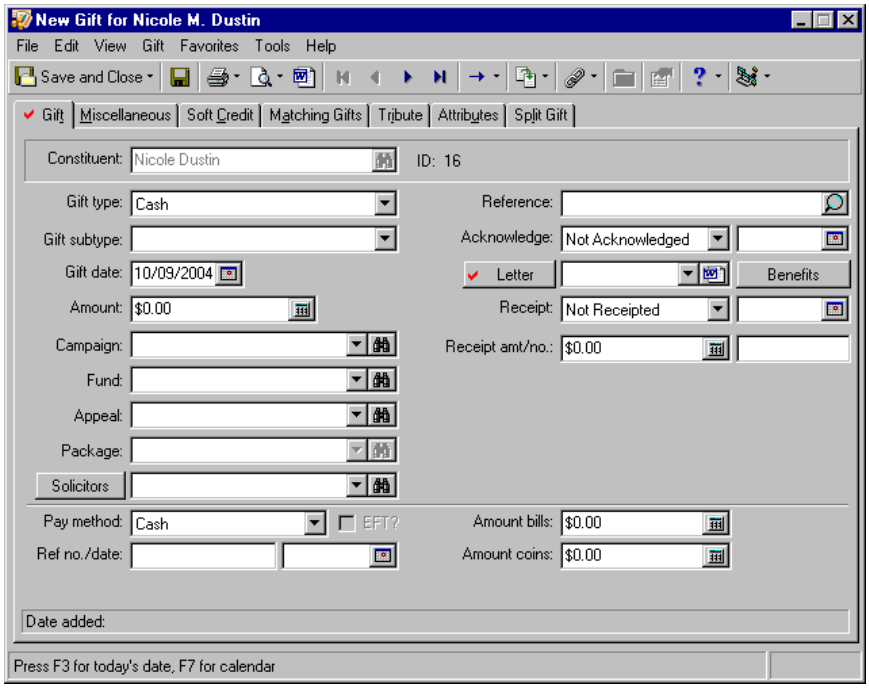
1. From Nicole Dustin's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

2. To add a gift to Nicole's constituent record, click **New Gift** on the action bar. The New Gift screen appears. Because you are adding the gift from Nicole's constituent record, the program inserts Nicole's name in the **Constituent** field.

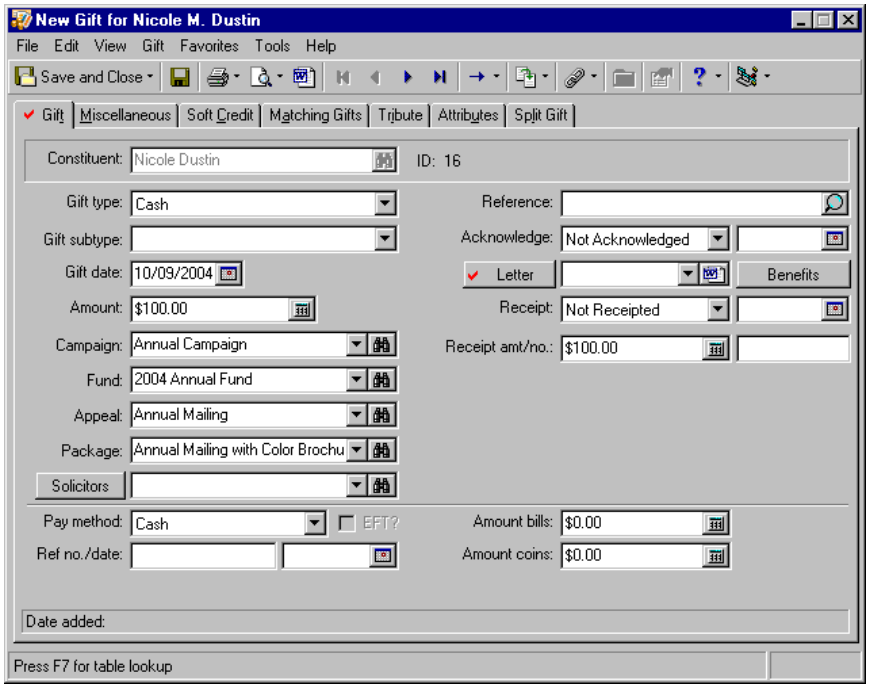
   Once a name is in the **Constituent** field, you cannot change it. If you need to change the name, close the gift record without saving and begin a new record.



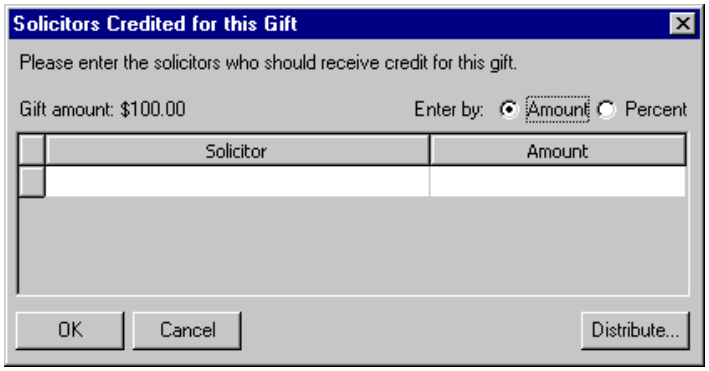
3. In the **Gift type** field, select "Cash".
4. You have not defined any subtypes for cash gifts so you can leave the **Gift subtype** field blank.
5. In the **Gift date** field, enter the date 10/09/2004 because your organization decides to record the date you received the gift.

   To be consistent, your organization needs to decide on a convention to record dates. For example, in the **Gift date** field, you can enter the date you receive the payment or the date the constituent mailed the payment.
6. In the **Amount** field, enter the amount $100, which is the amount of Nicole's check.
7. In the **Campaign** field, select "Annual Campaign".
8. In the **Fund** field, select "2004 Annual Fund".
9. In the **Appeal** field, select "Annual Mailing".

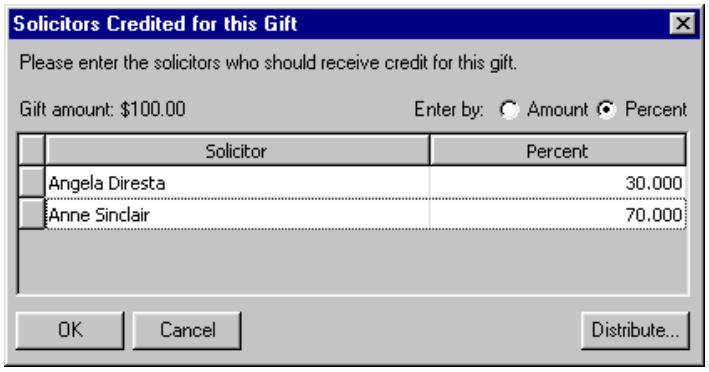
10. In the **Package** field, select “Annual Mailing with Color Brochure”. Packages are a way of further defining the appeal. Perhaps you send a full color brochure to your major donors and a black and white brochure to your prospective donors.



11. To add Angela Diresta and Anne Sinclair as solicitors, click **Solicitors**. The Solicitors Credited for this Gift screen appears.

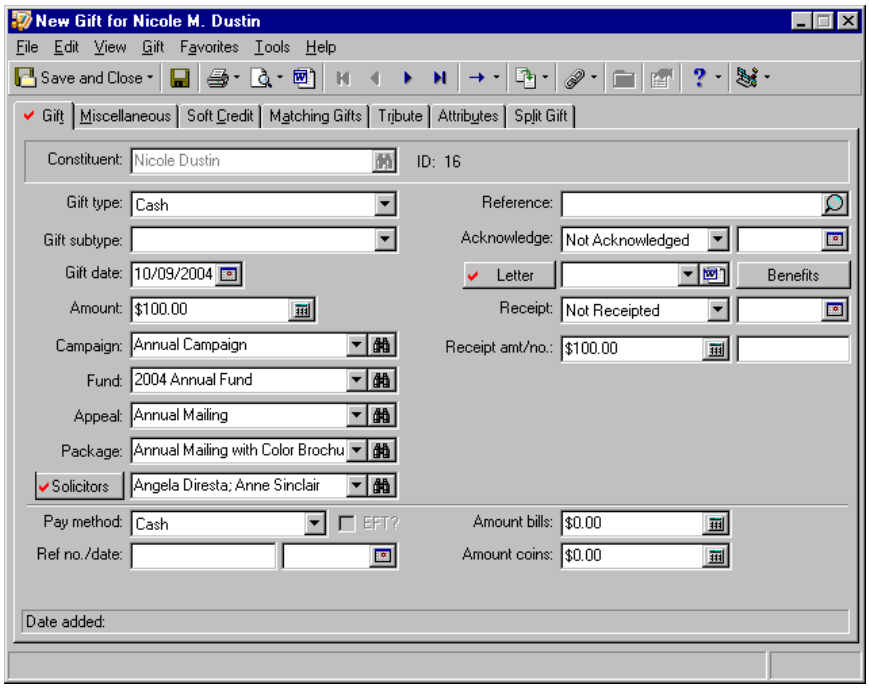


12. Because you want to credit the solicitors with a percentage of the gift, select **Percentage** in the **Enter by** field. On the first row of the grid, enter Angela Diresta in the **Solicitor** column and credit her with 30 percent of the gift. On the second row of the grid, enter Anne Sinclair and credit her with 70 percent of the gift.



Note: If you cannot see all the solicitors in the **Solicitors** field, you can hold the mouse (hover) over the **Solicitors** field to view a tool tip displaying the names of the solicitors.

13. Click **OK** to return to the Gift tab. Angela Diresta and Anne Sinclair appear in the **Solicitors** field. For more information about crediting solicitors for a gift, see "Crediting Solicitors for a Gift" on page 32.

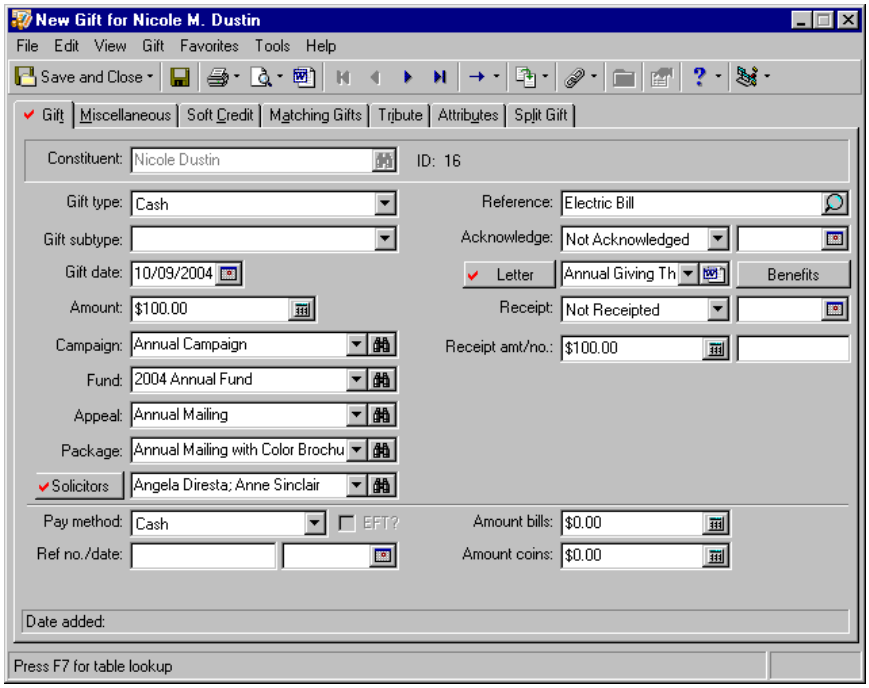


14. In the **Reference** field, enter "Electric Bill" to indicate Nicole wants her gift to pay this bill.

Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see "Creating an Acknowledgement Letter from a Gift Record" on page 101.

15. In the **Acknowledge** field, select "Not Acknowledged". You plan to generate a thank-you letter through *Mail*, so it is not necessary to enter a reference date. *Mail* automatically updates the **Acknowledge** field to Acknowledged and adds the date you print the letter. For more information about generating letters through *Mail*, see the *Mail Guide*.

16. In the **Letter** field, select “Annual Giving Thank You”. In *Configuration*, you defined the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
17. In the **Receipt** field, select “Not Receipted”. You plan to print receipts using *Mail*, so it is not necessary to enter a reference date. When you print a receipt for this gift in *Mail*, the program updates the **Receipt** field to Receipted and adds the date you printed the receipt.
18. In the **Receipt amt** field, enter the amount $100, which is the receipt amount for the gift. It is not necessary to enter a receipt number in the **Receipt no.** field because the program can automatically add the receipt number when you print a receipt for this gift using *Mail*.

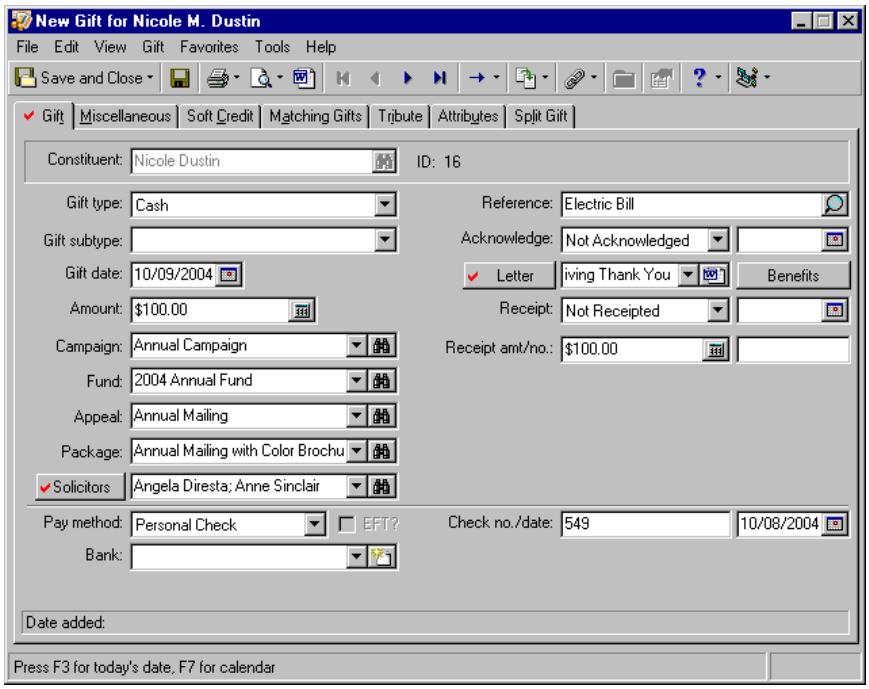


19. In the **Pay method** field, select “Personal Check”.

The Raiser’s Edge requires Internet access to connect to the Blackbaud *Payment Service*. If ***The Raiser’s Edge*** cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the “X” in the upper right corner to close the record without saving.

If you select “Credit Card,” to help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, ***The Raiser’s Edge*** stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** field displays a masked credit card number, with only the last four digits visible.

20. In the **Check no/date** fields, enter the check number “549” and date 10/08/2004.



21. To add Nicole’s gift to your database, click **Save and Close** on the toolbar.

Note: If a credit card number has been sent to Blackbaud *Payment Service* and can be used for processing again, the masked number displays * for the hidden numbers. If the credit card can no longer be used for credit card processing, the masked number displays a ? for the hidden numbers.

Gifts-in-Kind

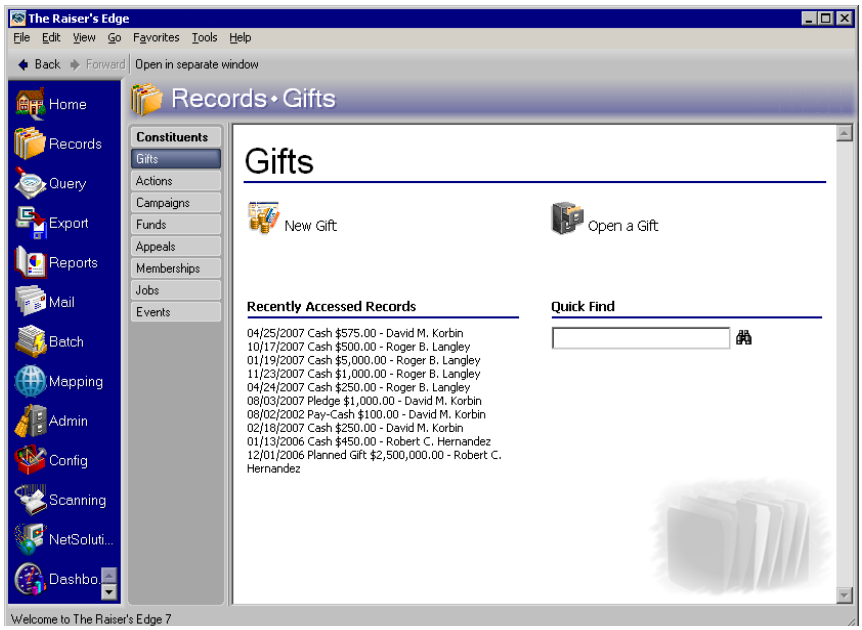
A Gift-in-Kind is a donation of goods or services for which you can easily assign a monetary value. Some examples of Gifts-in-Kind include furniture, computer equipment, and time donated by an accountant. When you add a gift record for a Gift-in-Kind, you can record an estimate of the value of the gift.

Adding a Gift-in-Kind

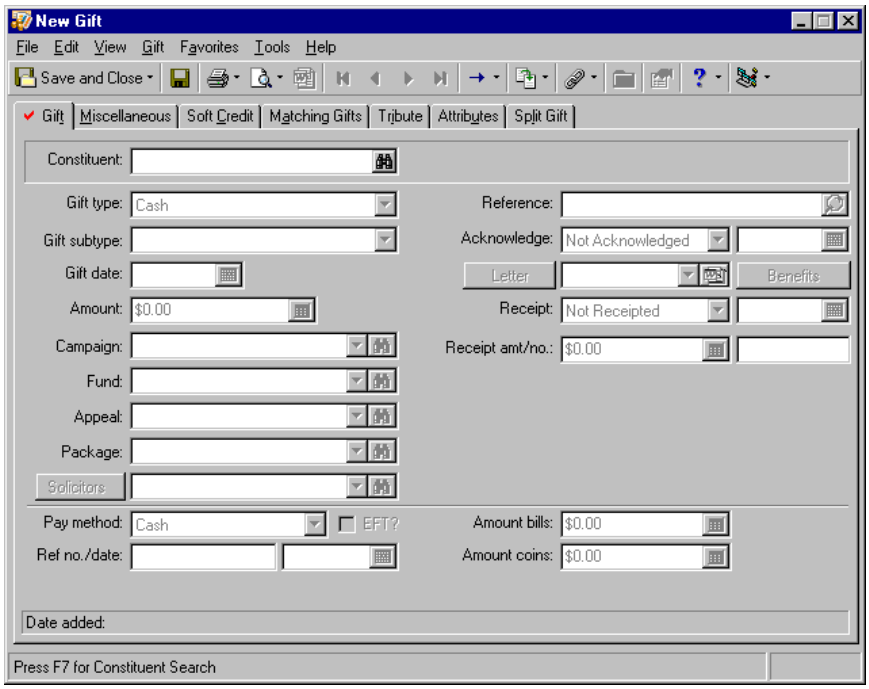
Scenario: The Computer Warehouse donated 10 computers with an estimated value of $3,500 to your organization on 12/12/2005. Cole Hensley is the solicitor responsible for obtaining this gift. You plan to use this gift in your Smith-Brown Scholarship Fund, which is a part of your Scholarship Campaign.

1. On the Raiser’s Edge bar, click **Records**.

2. Click the **Gifts** link. The Gifts page appears.



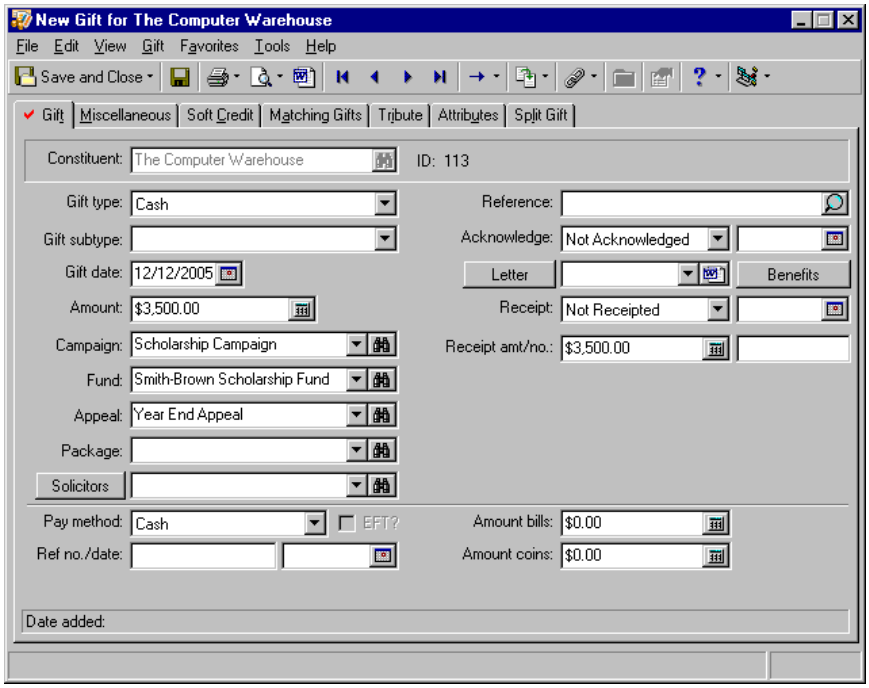
3. Click **New Gift**. The New Gift screen appears.



4. In the **Constituent** field, click the binoculars to search for “The Computer Warehouse” in your database. When you find and select this constituent, the name appears in this field. After you enter a name in the **Constituent** field, the field is disabled.
5. In the **Gift type** field, select “Gift-in-Kind”.
6. To further define the gift type, select “Computers” in the **Gift subtype** field.

To enter a new **Gift subtype**, type the entry directly in the **Gift subtype** field. You can also add a new subtype from Configuration by clicking the **Tables** link. When the Tables page appears, select **Gift SubType** in the box on the left and click **New Table Entry** on the action bar. You can add table entries only if you have appropriate security rights.

7. In the **Gift date** field, enter the date 12/12/2005 because that is the date your organization received the gift from The Computer Warehouse.
8. In the **Value** field, enter the amount $3,500, which is the estimated value of the computers.
9. In the **Campaign** field, select “Scholarship Campaign”.
10. In the **Fund** field, select “Smith-Brown Scholarship Fund”.
11. In the **Appeal** field, select “Year End Appeal”.
12. In this case, packages were not created for the “Year End Appeal”, so you do not need to specify one in the **Package** field.

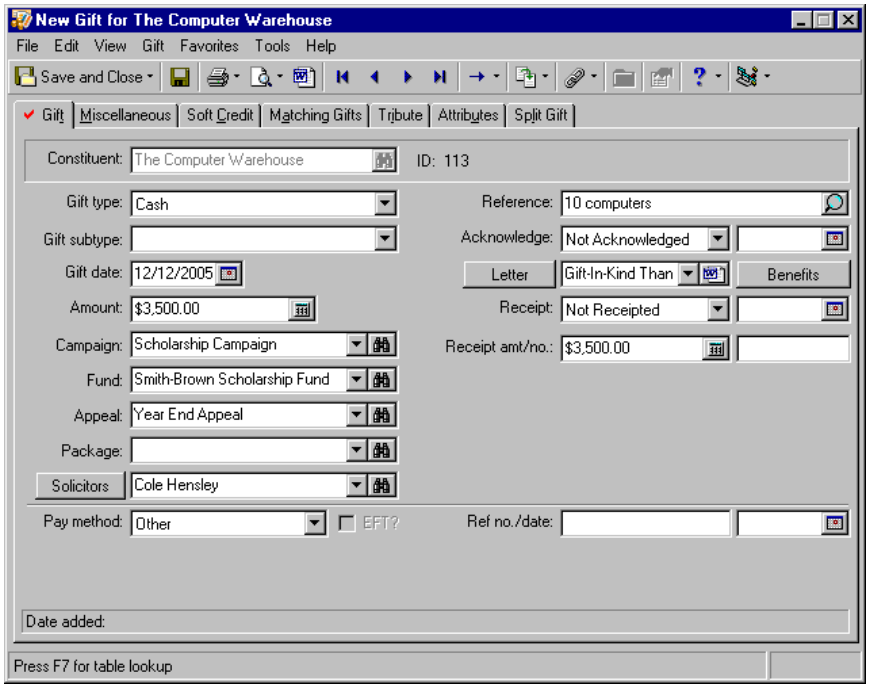


13. In the **Solicitors** field, enter “Cole Hensley”. When you leave this field, the program verifies Cole is designated as a solicitor on his constituent record. For more information about crediting a solicitor for a gift, see “Crediting Solicitors for a Gift” on page 32.
14. In the **Reference** field, enter “10 computers” to indicate the number and type of computers you received.

Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

15. In the **Acknowledge** field, select “Not Acknowledged”. It is not necessary to enter a corresponding date. Later, when you acknowledge this gift using *Mail*, the program can update the **Acknowledge** field to Acknowledged and add the date you created the letter.
16. In the **Letter** field, select “Gift-in-Kind Thank You”.
17. In the **Receipt** field, select “Not Receipted”. It is not necessary to enter a corresponding date. Later, when you receipt this gift using *Mail*, the program can update the **Receipt** field to Receipted and add the date you created the receipt. For more information about creating receipts in *Mail*, see the *Mail Guide*.

18. In the **Receipt amt** field, enter the amount $3,500. It is not necessary to enter information in the **Receipt no.** field. When you create a receipt in *Mail*, the program can update this field with the appropriate information.
19. In the **Pay method** field, select “Other” because this gift was paid with computer equipment instead of currency.
20. You are not tracking any reference information for this payment method at this time, so you can leave the **Ref no./date** fields blank.



21. To add the gift to the database, click **Save and Close** on the toolbar.

Stock/Property Gifts

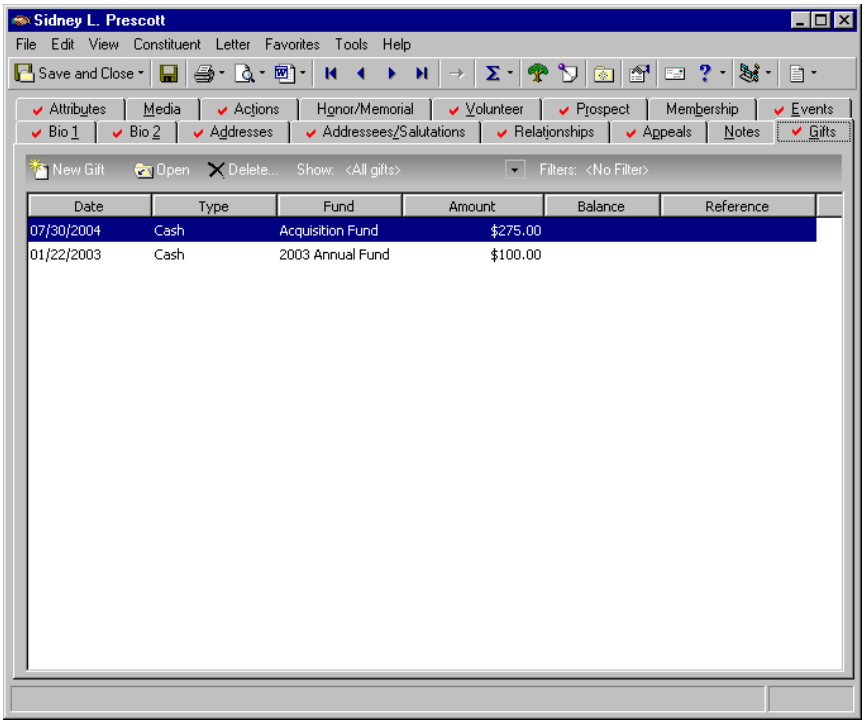
When a constituent donates stock or property, such as land, estate, or 10 shares of stock, you can classify the gift as Stock/Property. When you receive a Stock/Property gift, your organization may choose to keep the gift or sell the Stock/Property to benefit the goals of your organization. When recording the value of a Stock/Property gift, you should enter the gift’s value as of the date it is transferred to your organization. If you decide to sell the Stock/Property gift, you can use the **Sell Stock/Property** option to record the sale amount. For more information about selling a Stock/Property gift, see “Selling a Stock/Property Gift” on page 81.

Adding a Stock/Property Gift

Adding a Stock/Property gift

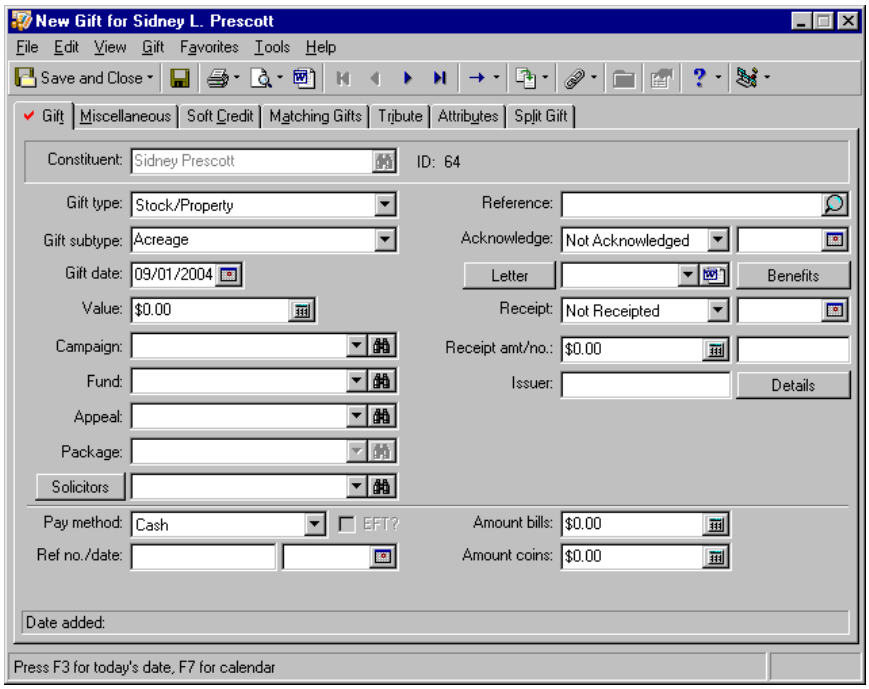
Scenario: Your organization is a museum and you have plans to add a new gallery for a special exhibition. You organize a campaign, called the Endowment Campaign, to raise funds for this venture. As part of this campaign, you send out a special appeal, called the Planned Giving Letter, to people who own land adjacent to your museum. On 09/01/2004, Sidney Prescott donates 10 acres of land on which the gallery can be built. The value of this land is estimated to be $1.1 million. Because of the size of this gift, you write a personal letter on 09/02/2004 thanking Sidney Prescott for the gift. In this letter, you include a handwritten receipt with the number 152 for the $1.1 million gift and 50 free tickets to the museum.

1. From Sidney Prescott's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



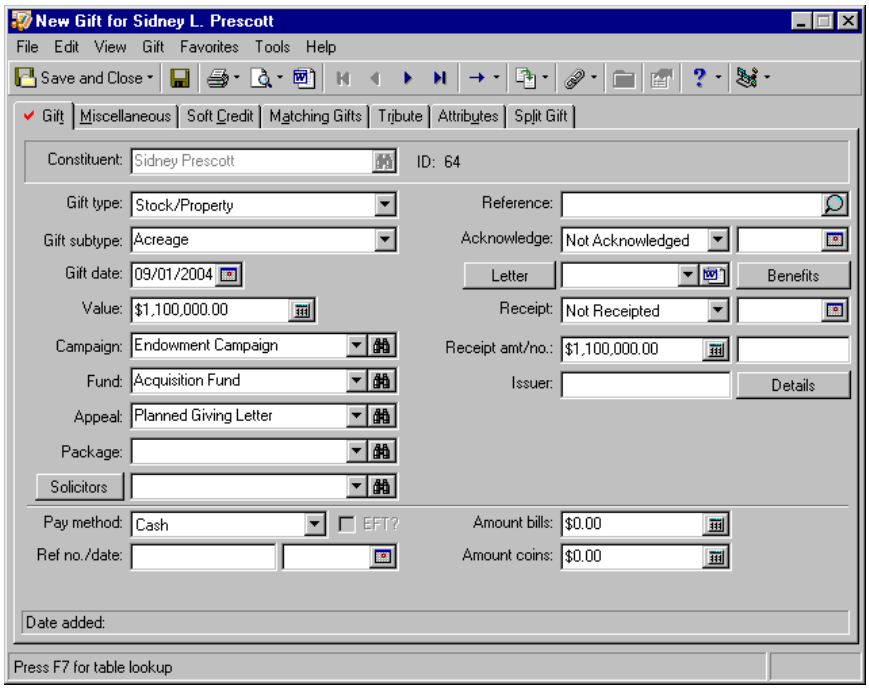
2. On the action bar, click **New Gift**. The New Gift screen appears.
3. On the New Gift screen, select "Stock/Property" in the **Gift type** field.

4. In the **Gift subtype** field, select “Acreage”.



5. In the **Gift date** field, enter the date 09/01/2004, which is the date Sidney Prescott agreed to donate the gift.
6. In the **Value** field, enter the amount $1,100,000.
7. In the **Campaign** field, select “Endowment Campaign”.
8. In the **Fund** field, select “Acquisition Fund”.
9. In the **Appeal** field, select “Planned Giving Letter”.

10. This appeal has not been divided into packages so you can leave the **Package** field blank.

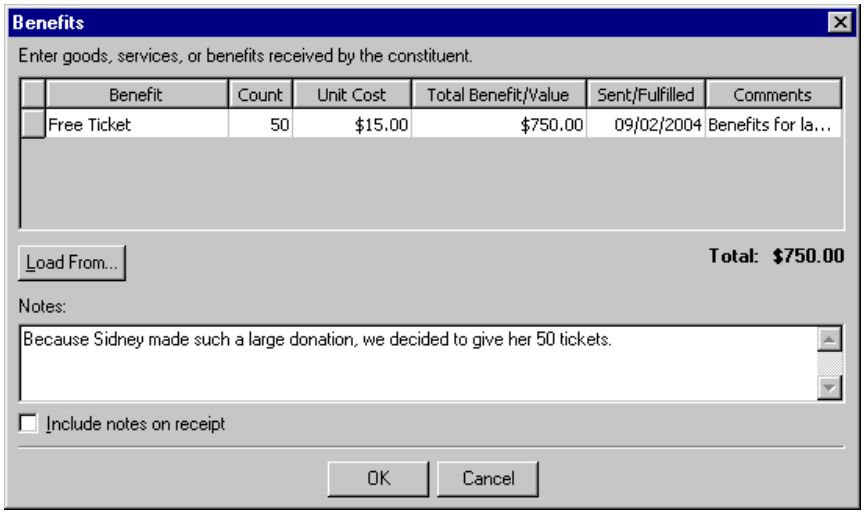


11. Because Sidney donated the gift in response to your letter, leave the **Solicitors** field blank.
12. In the **Reference** field, enter “10 acres of land”.

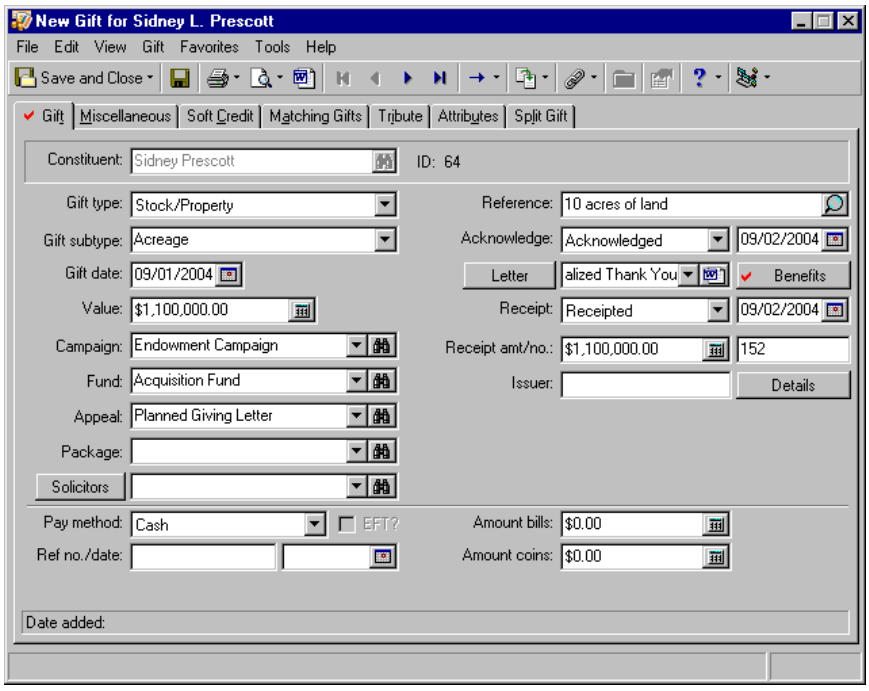
Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

13. In the **Acknowledge** field, select “Acknowledged” because you wrote a handwritten thank-you letter to Sidney. In the field to the right of the **Acknowledge** field, enter the date 09/02/2004 because this is the date you mailed the letter.
14. In the **Letter** field, select “Personalized Thank You” to show the type of letter you mailed to Sidney Prescott.

15. To add the tickets you are giving to Sidney, click **Benefits**. Add 50 tickets as seen in the screen shot below. When you finish adding the benefits click **OK**. You return to the New Gift screen. For more information about adding benefits to a gift record, see “Benefits” on page 41.

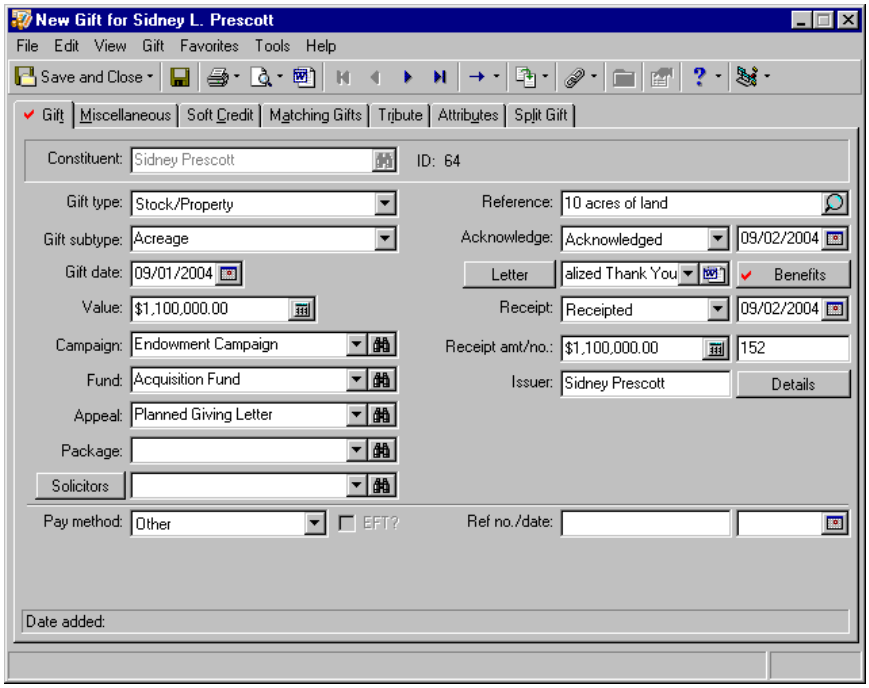


16. Select “Receipted” because you already sent a receipt to Sidney.
17. In the **Receipt** date field, enter the date 09/02/2004, which is the date you posted the receipt.
18. Notice the amount in the **Receipt** field updates automatically when you click **Yes** on the benefits value message when you save the information in the Benefits screen. The new receipt amount reflects the gift amount minus the Total Benefit Value on the Benefit screen. This is the tax deductible portion of the gift.
19. In the **Receipt no.** field, enter the receipt number “152”.



20. In the **Issuer** field, enter “Sidney Prescott”. Because this is a gift of property, it is not necessary to click the **Details** button.

21. In the **Pay method** field, select “Other” because this gift was paid with land instead of currency. You are not tracking any reference information for this payment method at this time, so you can leave the **Ref no./date** fields blank.



22. To add Sidney’s gift to the database, click **Save and Close** on the toolbar.

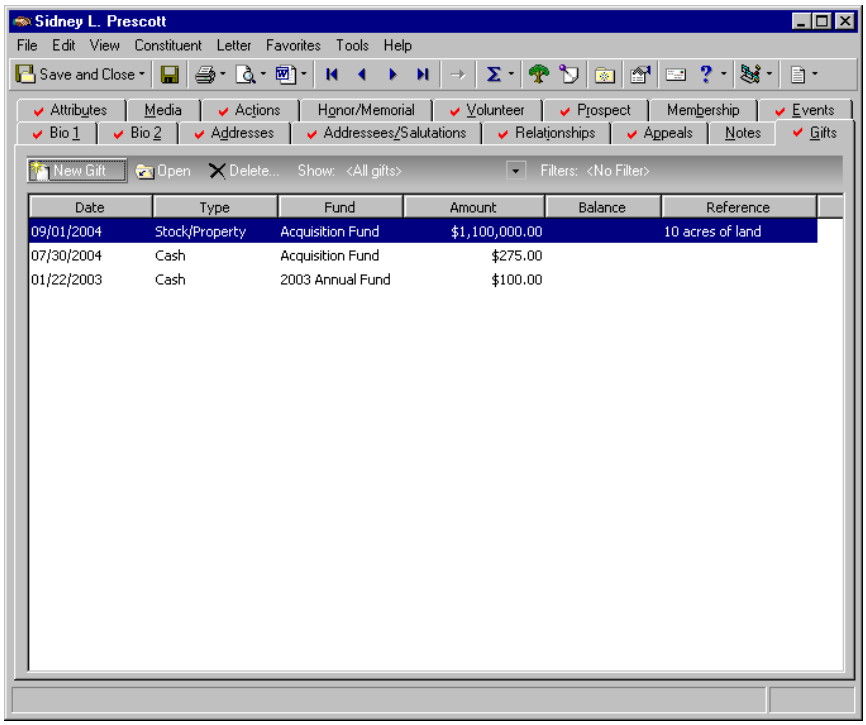
Selling a Stock/Property Gift

When a constituent donates land or stock certificates, you may sell the gift to use the funds to benefit your organization. When this happens, you need to create a gift record for the stock or property and record the value of the gift on the day it was transferred to your organization. You can use the **Sell Stock/Property** option to modify this gift record to include the sale amount of the stock or property and any fees incurred by your organization to initiate the sale.

Selling a Stock/Property gift

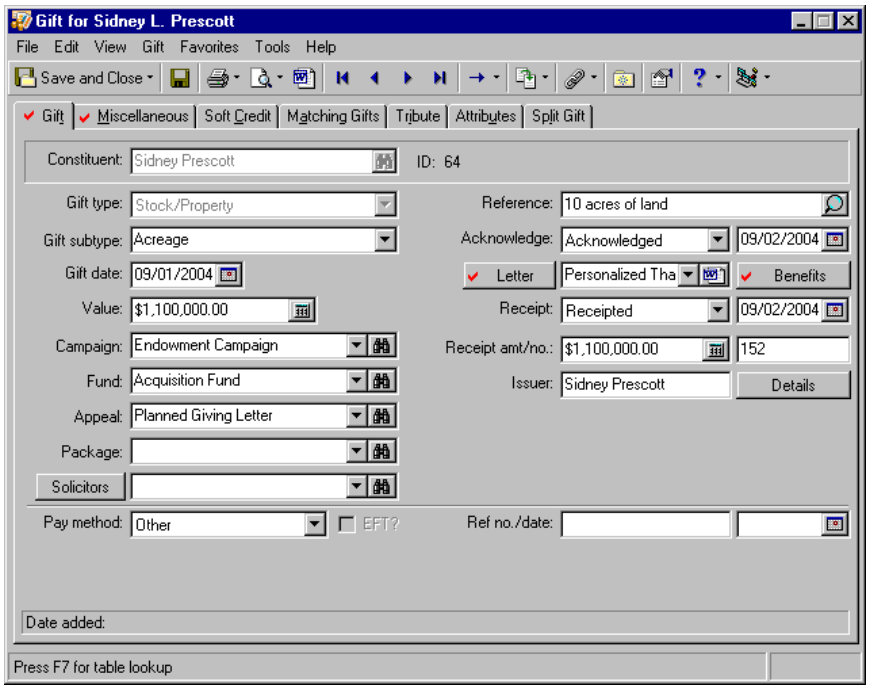
Scenario: Recently, Sidney Prescott donated 10 acres of land to benefit your museum. Your organization decides to sell the land to raise money for an upcoming exhibit. From the sale, your organization receives $1.5 million. The broker who assisted with the sale charges $10,000 for his services. Before you use the **Sell Stock/Property** option, you need to add a gift record for the Stock/Property gift to record the value of the gift on the day it was transferred to your organization. This scenario uses the gift record added in "Adding a Stock/Property gift" on page 77.

1. From Sidney Prescott's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

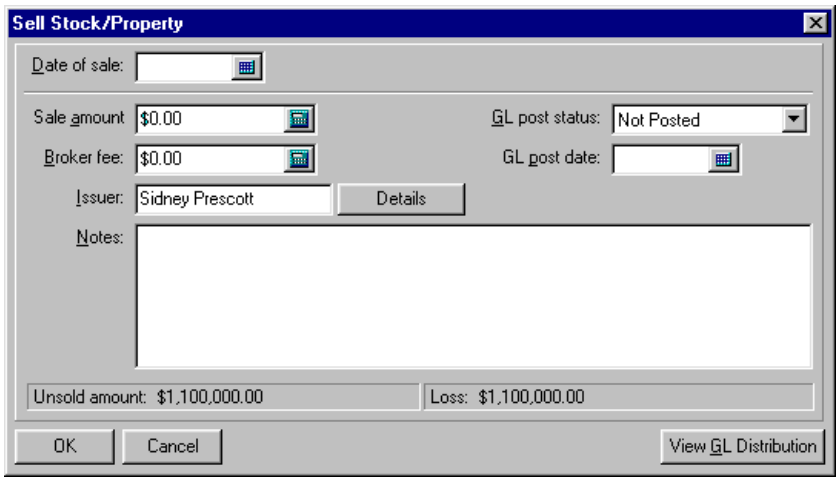


2. In the grid, select Sidney's gift of $1,100,000.

3. Click **Open**. Sidney's gift record appears.

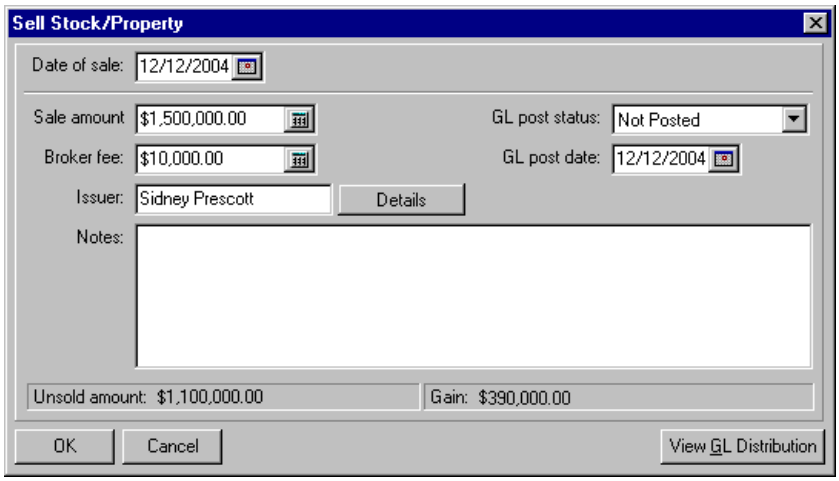


4. From the menu bar, select **Gift**, **Sell Stock/Property**. The Sell Stock/Property screen appears.



5. In the **Date of sale** field, enter the date 12/12/2004. This is the date you sold Sidney's land.
6. In the **Sale amount** field, enter the amount $1,500,000. This is the amount you obtained from the sale of Sidney's land.
7. In the **Broker fee** field, enter the amount $10,000. This is the fee you paid to the agent who helped you find a buyer for the land.
8. In the **GL post status** field, select "Not Posted".

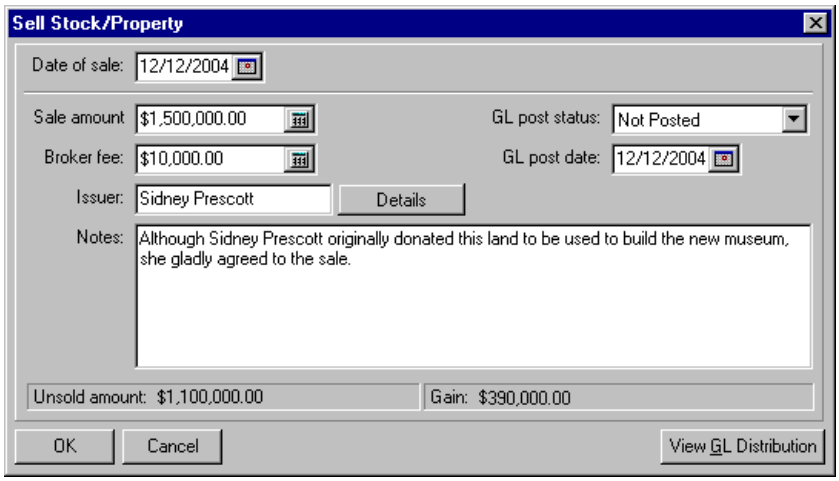
9. In the **GL post date** field, enter the date 12/12/2004.



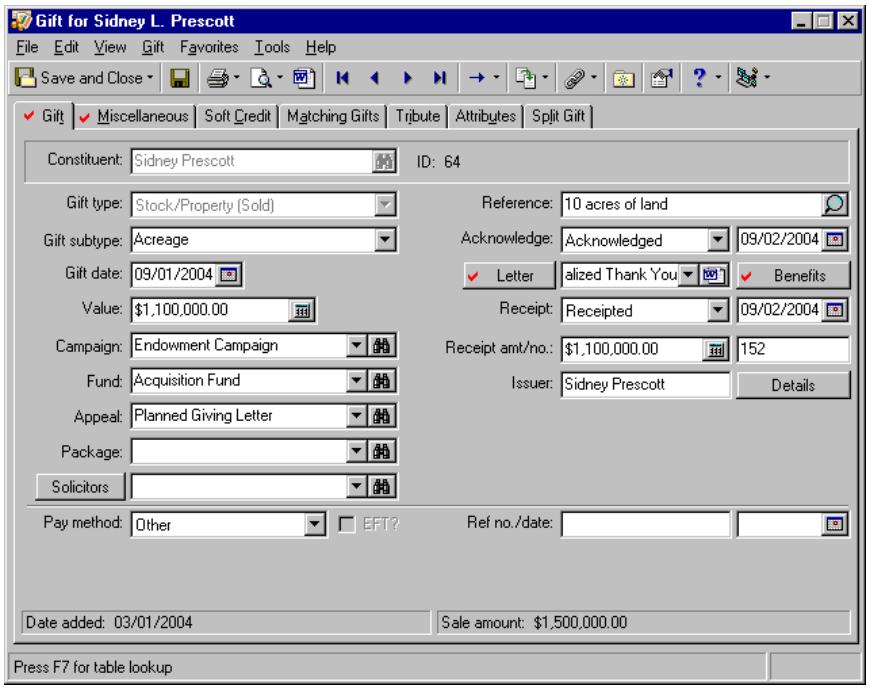
10. In the **Issuer** field and **Details** button, the program defaults the information you entered in the **Issuer** field and **Details** button on the gift record. In this case, you do not need to update this information.

Note: The status bar at the bottom of the Sell Stock/Property screen reflects the unsold amount of the land's worth, and the amount you gain from the sale minus the Broker fee.

11. In the **Notes** box, enter any important information about the sale. Enter "Although Sidney Prescott originally donated this land to be used to build the new museum, she gladly agreed to the sale."



12. Click **OK**. You return to the gift record. The entry in the **Gift type** field changes to Stock/Property (Sold).



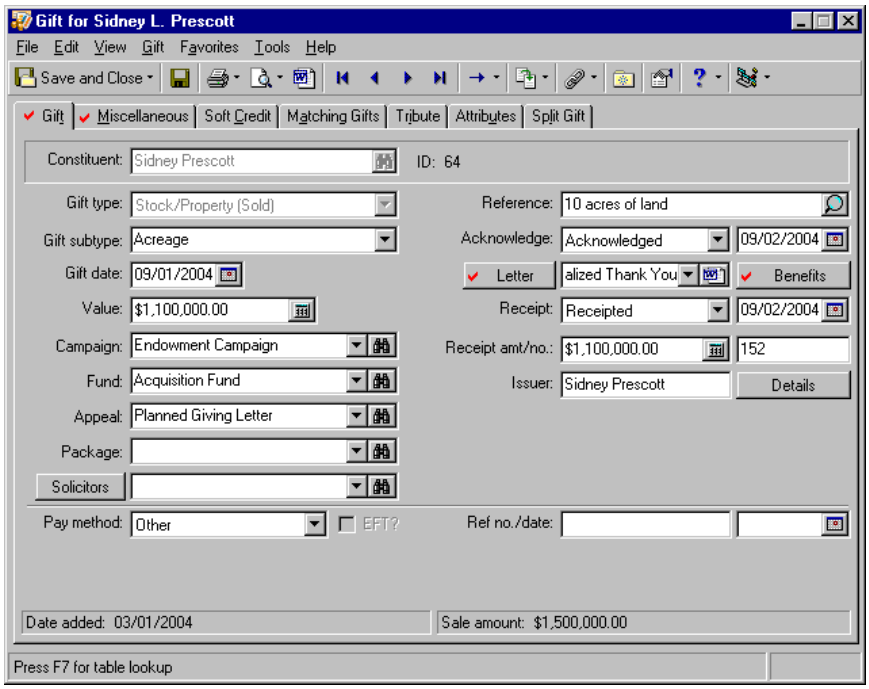
13. Click **Save and Close** on the toolbar.

Editing or Deleting a Sale of Stock Transaction

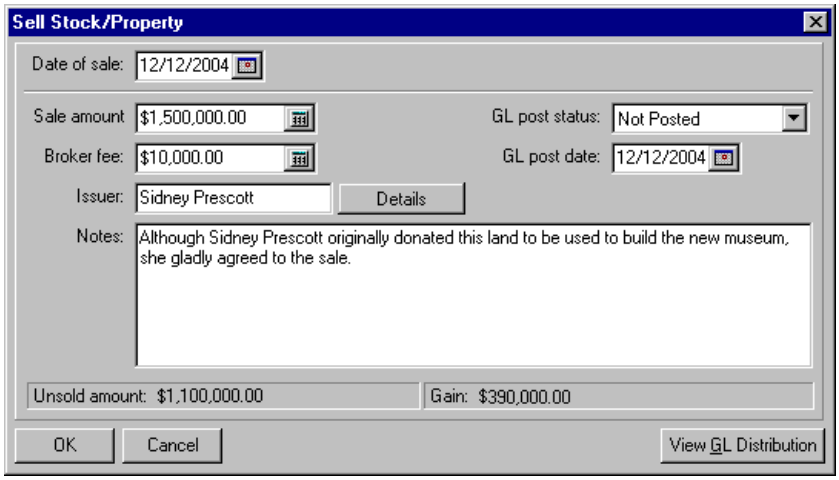
You may need to edit or delete information about the sale of a Stock/Property gift. For example, the broker could increase the fee charged for the transaction or you may need to correct a data entry error.

Editing or deleting a sale of stock transaction

1. Open a gift record with the **Gift type** of Stock/Property (Sold). For more information about opening a gift record, see “Accessing a Gift Record” on page 7.



2. From the menu bar, select **Gift**, **Sold Stock/Property Information**. The Sold Stock/Property Information screen appears.



3. To edit the sale information, enter the changes on the Sold Stock/Property Information screen and click **OK**. You return to the gift record.
4. To delete the sale information, click **Delete**. A message appears.

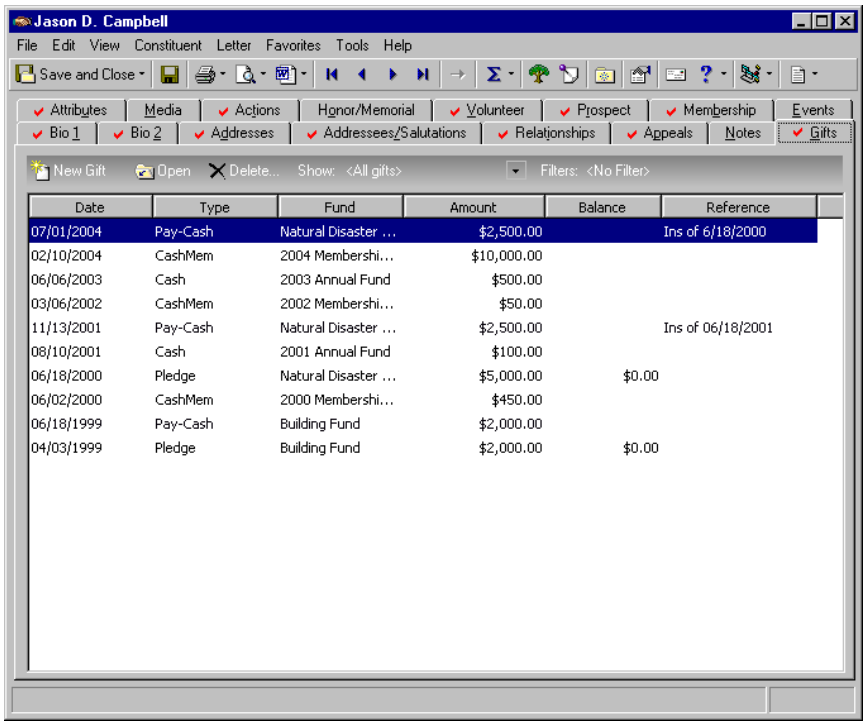
5. Click **Yes** to delete the sale of Stock/Property information and return to the gift record. Click **No** to return to the Sold Stock/Property Information screen without deleting any information.
6. From the gift record, click **Save and Close** on the toolbar to save the changes and close the record.

Editing a Gift Record

- **Viewing or editing an existing gift from the Gifts tab of a constituent record**

  You can view any gift record if you have security rights. However, you can edit only gift records that have not been posted to ***General Ledger***. After a gift is posted to ***General Ledger***, you can adjust the gift record if you need to change the gift amount or the campaigns, funds, appeals, and packages to which the gift is attributed. For more information, see “Adjusting a Gift” on page 91.

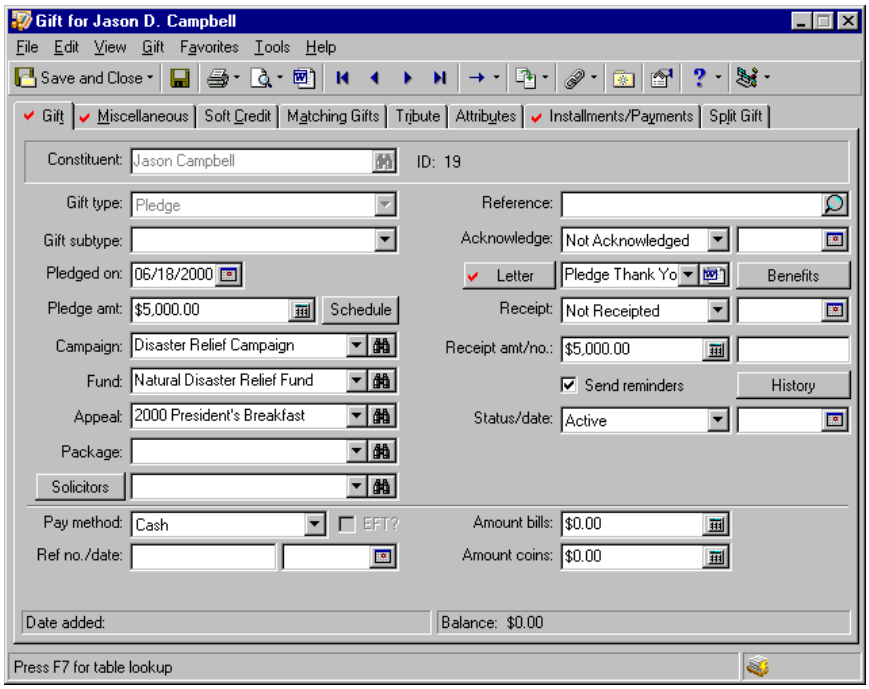
  1. From a constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



Note: If the gift has been posted to Blackbaud’s ***General Ledger***, all fields on the gift record are disabled. You can change the information on the gift record using the **Adjust** option. For further details on this option, see “Adjusting a Gift” on page 91.

2. In the Gifts grid, select the gift you want to view or edit.

3. Click **Open** on the action bar. The gift record appears.



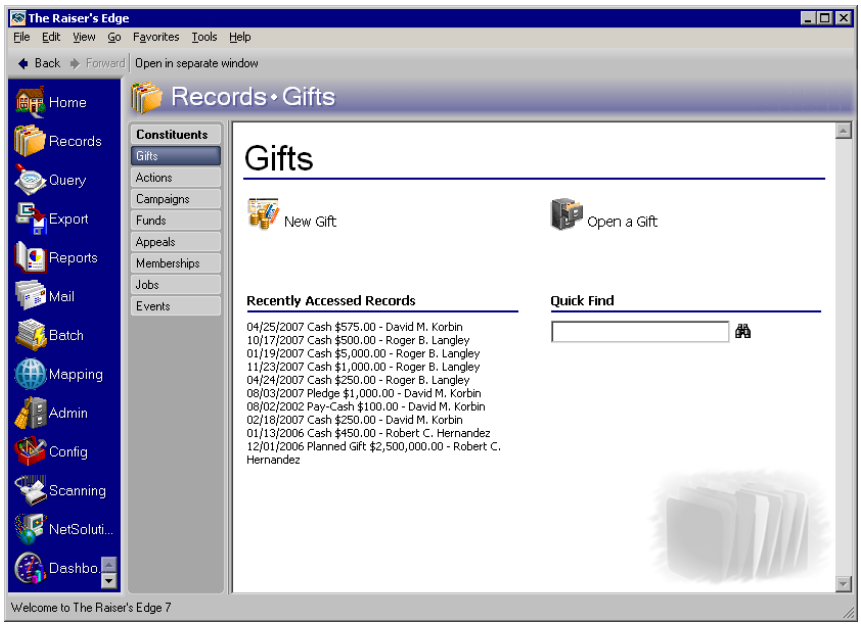
4. Change any necessary information.
5. Click **Save and Close** on the toolbar.

Viewing or editing an existing gift record from the Records page

You can view any gift record if you have security rights. However, you can edit only gift records that have not been posted to ***General Ledger***. After a gift is posted to ***General Ledger***, you can adjust the gift record if you need to change the gift amount or the campaigns, funds, appeals, and packages to which the gift is attributed. For more information, see “Adjusting a Gift” on page 91.

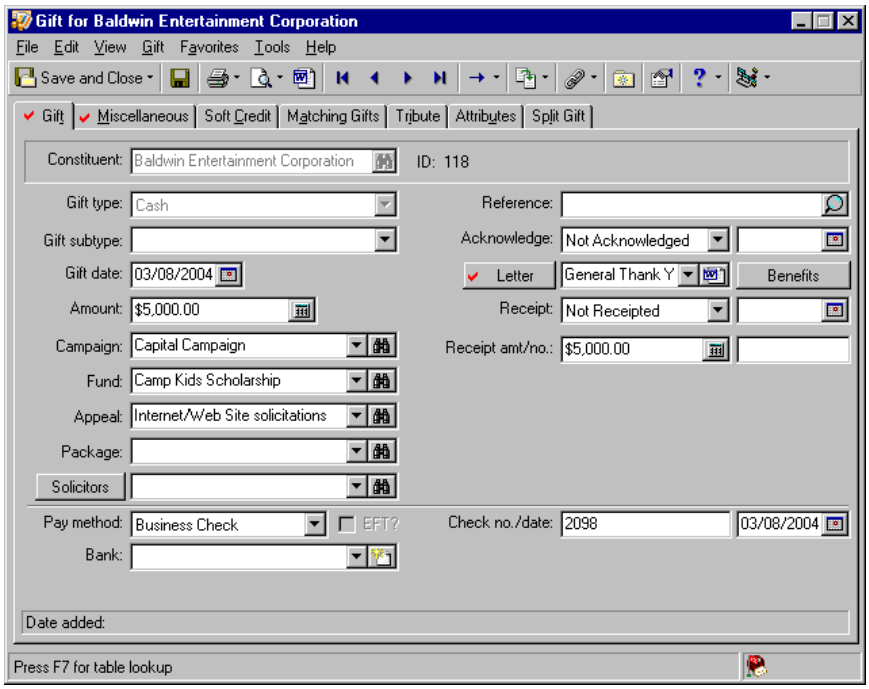
1. On the Raiser’s Edge bar, click **Records**.

2. Click the **Gifts** link. The Gifts page appears.



Note: If the gift has been posted to Blackbaud's ***General Ledger***, all fields on the gift record are disabled. You can change the information on the gift record using the **Adjust** option. For further details on this option, see "Adjusting a Gift" on page 91.

3. To open the gift record you want to view or edit, click **Open a Gift** and search the database for that gift. For more information about opening a gift record, see "Accessing a Gift Record" on page 7. The gift record appears. To edit the gift, change any necessary information.



4. Click **Save and Close** on the toolbar.

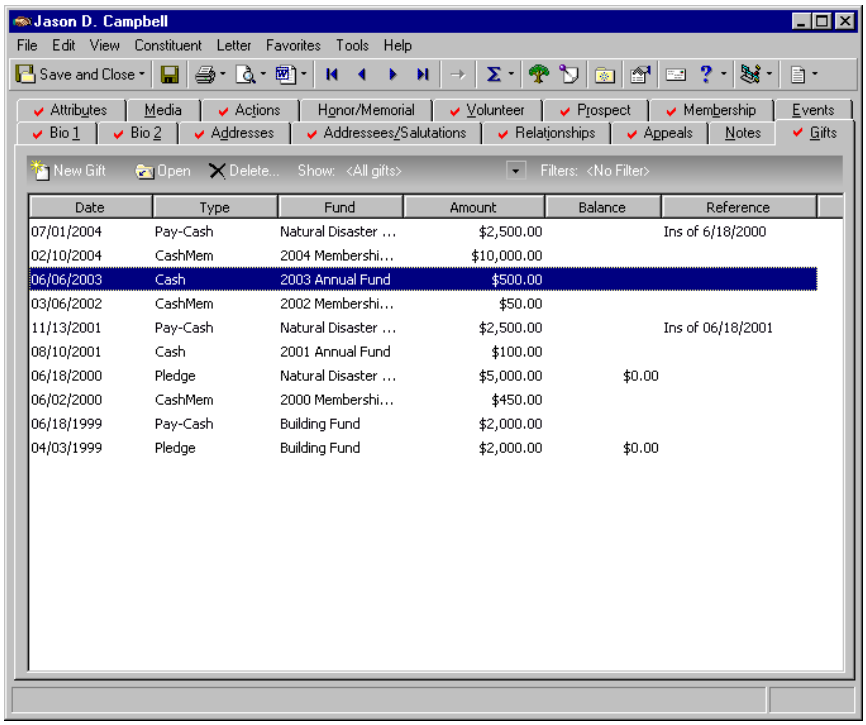
Deleting a Gift Record

Deleting a gift from the Gifts tab of a constituent record

If you have security rights, you can delete a gift record from the database. If you delete a pledge from the database, gift records for payments applied to the pledge are also deleted.

Warning: We strongly recommend you make a backup copy of the database before deleting any information from ***The Raiser's Edge***.

1. From a constituent record, select the Gifts tab. For more information about accessing a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



Note: If you are deleting a payment for a Recurring gift, it is important to take an additional step on the Recurring gift template. After deleting the payment, open the Recurring gift record. Select the Transactions tab and click **Rollback Transaction**. This resets the date for your payment schedule in the **Next transaction due** field (in the lower right corner on the Transactions tab). Resetting the date is important to avoid unintentional skipped transactions. For more information about Recurring gifts, see the Recurring Gifts chapter in this guide.

2. In the grid, select the gift you want to delete.
3. Click **Delete** on the action bar. A message appears.

4. To delete the gift record, click **Yes**.

5. Click **Save and Close** on the toolbar to save the changes and close the constituent record.

Adjusting a Gift

After entering a gift record in ***The Raiser's Edge***, you can use the **Adjust** option to make and track any changes to the gift amount or funds to which the gift is designated (including reversing a gift). For example, John Smith decides to donate a $10,000 gift to your organization. However, on the gift record, $1,000 was entered by mistake in the **Amount** field. You can use the **Adjust** option to correct this data entry error and create a record of the change for your auditors.

Note: If you do not have Blackbaud's ***General Ledger,*** you can still use the procedures in this section when adjusting a gift. However, if you want to make an additional adjustment, you need to post your gifts from the **Post to General Ledger** link in *Administration* to remove any Pending adjustments. For more information about the complete process of posting to ***General Ledger***, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

You can also use the **Adjust** option to change a gift record when the constituent is not able to transfer funds to your organization. For example, Mary Rodgers made a donation to your 2000 Annual Fund using a personal check. After you added a gift record in the database for Mary's gift, the bank informed you Mary did not have enough money in her account to pay the check. You can adjust Mary's gift record to show your organization did not receive any money from the transaction.

When you use the **Adjust** option, you create an adjustment record containing information about the new gift amount and funds to which the gift is designated. Adjustment records are posted to the ***General Ledger*** so you can maintain a record of any changes in the gift amount or the distribution of incoming funds. If an adjustment has not been posted to the ***General Ledger***, it is referred to as "Pending." Only one pending adjustment can exist for each gift record. After posting a pending adjustment to the ***General Ledger***, you can make another adjustment to the gift record.

If a pending adjustment exists for a gift record, an **Adjustment Pending** display appears on the Miscellaneous tab of the gift record. This display indicates you must post the adjustment to the ***General Ledger*** before making additional changes to the gift record.

After you adjust a gift for the first time, the Adjustments tab appears on the gift record so you can view all the changes made to the gift record. From this tab, you can add, edit, and delete adjustments from the gift record.

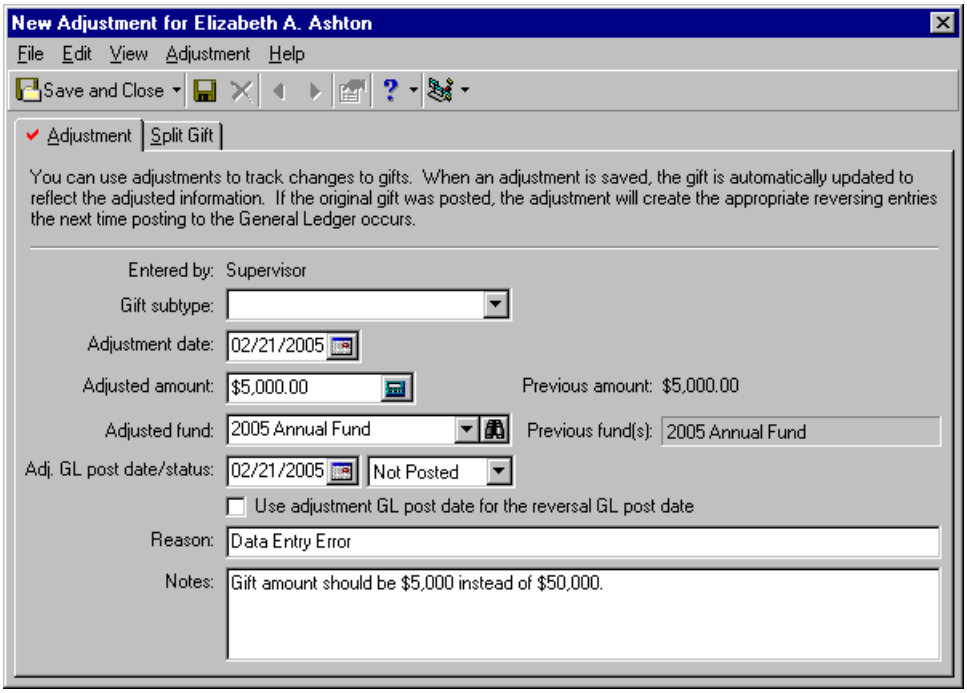
Adjustment Record

To create a record of changes made to a gift record, select **Gift**, **Adjust** from the menu bar. The New Adjustment screen appears so you can enter information about changes you are making to the gift amount and fund distribution. The information on this screen is divided into two tabs, the Adjustment tab and the Split Gift tab. If you are adjusting a pledge gift record, the Installment Schedule tab appears so you can adjust the installment schedule for the pledge. For more information about adjusting a pledge gift record, see "Adjusting a Pledge" on page 175.

After you save an adjustment record, an "Adjustment Pending" display appears on the Miscellaneous tab if the adjustment has not yet been posted to the ***General Ledger***. Also, the Adjustments tab appears on the gift record after you adjust a gift record for the first time so you can add additional adjustments for a gift and view, edit, and delete existing adjustments.

Adjustment Tab

On the Adjustment tab, enter information about the new gift amount, the fund to which the gift was attributed, and notes relating to why you are adjusting the gift.



Entered by. In the **Entered by** display, the program displays the user name of the last person to edit the adjustment record before the adjustment record is posted to the ***General Ledger***. For example, Sally added an adjustment for a gift record. However, before this adjustment was posted to ***General Ledger***, Mary edited the adjustment record. Therefore, the user name "Mary" appears in the **Entered by** display.

Gift subtype. In the **Gift subtype** field, you can record a change or addition of a gift subtype. For example, a constituent donated a Gift-in-Kind of ten computers. When you receive donations of computers, your organization enters Computers in the **Gift subtype** field on a gift record. If the subtype information is accidentally omitted, you can use the **Adjust** option to add a **Gift subtype** of Computers.

Adjustment date. In the **Adjustment date** field, the program defaults the current system date set on your workstation. You can change this date to any date you want to associate with the adjustment.

Adjusted amount. In the **Adjusted amount** field, enter the gift amount you want to associate with the adjustment. For example, you are adjusting a $120 gift to change the fund. Because the gift amount is the same for the adjustment, enter $120 in the **Adjusted amount** field. If you are adjusting the gift to change the gift amount, enter the corrected gift amount in the **Adjusted amount** field. For pledge gifts, enter the entire amount of the pledge. For recurring gifts, enter the transaction amount for the gift.

Adjusted fund. In the **Adjusted fund** field, the program defaults the funds entered on the original gift record. For example, if 2003 Annual Fund is entered in the **Fund** field on a gift record, 2003 Annual Fund appears in the **Adjusted fund** field. To change the fund to which the gift is designated, enter the new fund in this field. If the gift is split among multiple funds on the original gift record, the **Adjusted fund** field is disabled. You need to use the Split Gift tab on the adjustment record to select multiple funds to which the gift should be designated. For more information, see "Split Gift Tab" on page 93.

Note: If "Posted" or "Do Not Post" does not appear in the **GL post status** field, you do not have security rights to select these options. If you want to select one of these options, see your Supervisor. For more information about security, see the *Configuration & Security Guide*.

Adj. GL post date/status. In the **Adj. GL post date** field, enter the date to associate with the posting status of the adjustment information to the ***General Ledger***. In the **Adj. GL post status** field, select "Posted" or "Not Posted". Each adjustment you make to a gift record must eventually be posted to the ***General Ledger***; therefore Do Not Post is not an option.

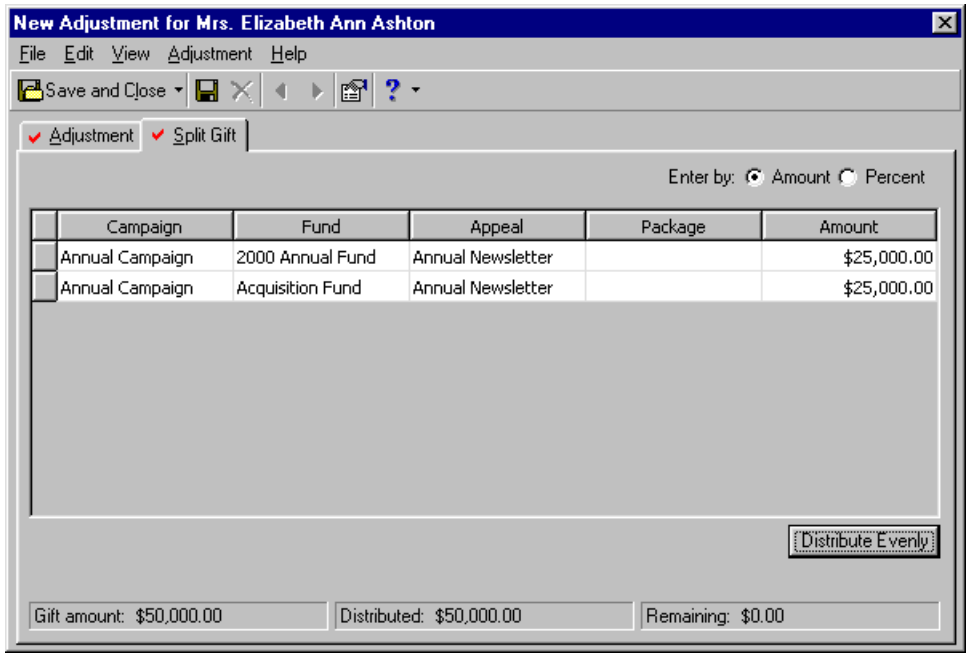
Use adjustment GL post date for the reversal GL post date. Mark this checkbox if you want to use the general ledger post date on the adjustment record as the post date for the reversal transaction that is generated when the adjustment is posted to general ledger. When marking this checkbox, the general ledger post date for the reversal is the same as the general ledger post date for the adjustment. If this checkbox is not marked, the general ledger post date for the reversal is the general ledger post date on the Miscellaneous tab on the original gift record. For more information about reversals, see "Posting Gifts to Blackbaud's General Ledger" on page 119 and *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits* guide.

Reason. In the **Reason** field, briefly explain why you are making an adjustment to this gift record. For example, you can enter "Data entry error" or "Insufficient funds".

Notes. In the **Notes** field, add additional information about the adjustment or further explain why you are making an adjustment to this gift record. For example, you can enter "The gift amount should be $5,000 instead of $50,000."

Split Gift Tab

If the unadjusted gift was split among multiple campaigns, funds, appeals, and packages or you want to split the adjusted gift, you can enter information on the Split Gift tab of the adjustment record.



On the Split Gift tab, you can split the gift among multiple campaigns, funds, appeals, and packages using the same method as on the Split Gift tab of a gift record. For more information about splitting a gift, see "Splitting a gift between two funds" on page 64.

Adjusting a Gift Record for the First Time

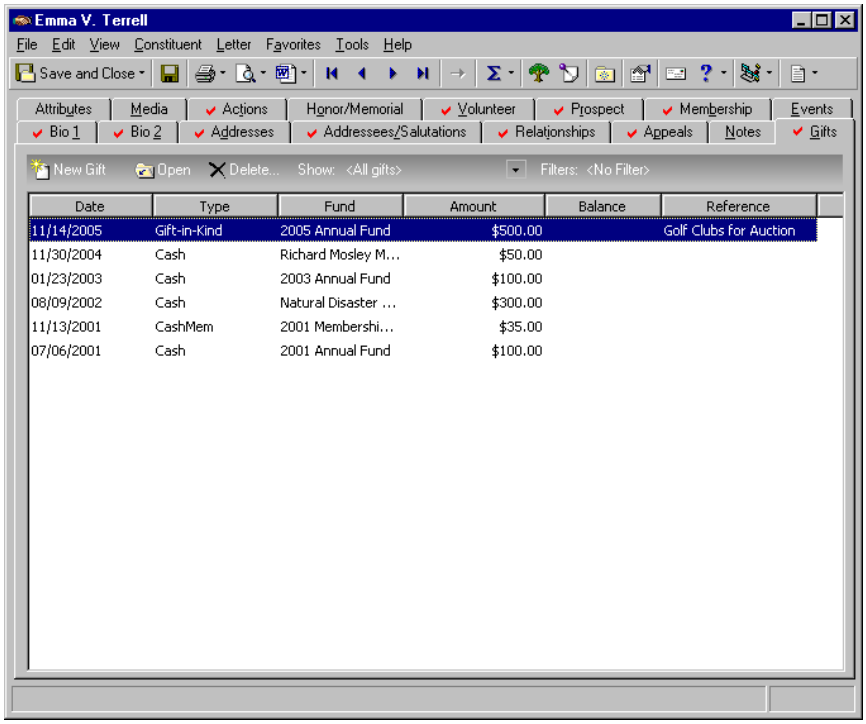
Note: If you need to reverse a gift, you must adjust the gift record.

Now that you understand the tabs and options on the adjustment record, you are ready to adjust a gift record in the database. The method you use to adjust a gift for the first time differs from when you add additional adjustments. For more information about adding additional adjustments, see “Adding additional adjustments to a gift record” on page 98.

Adjusting a gift for the first time

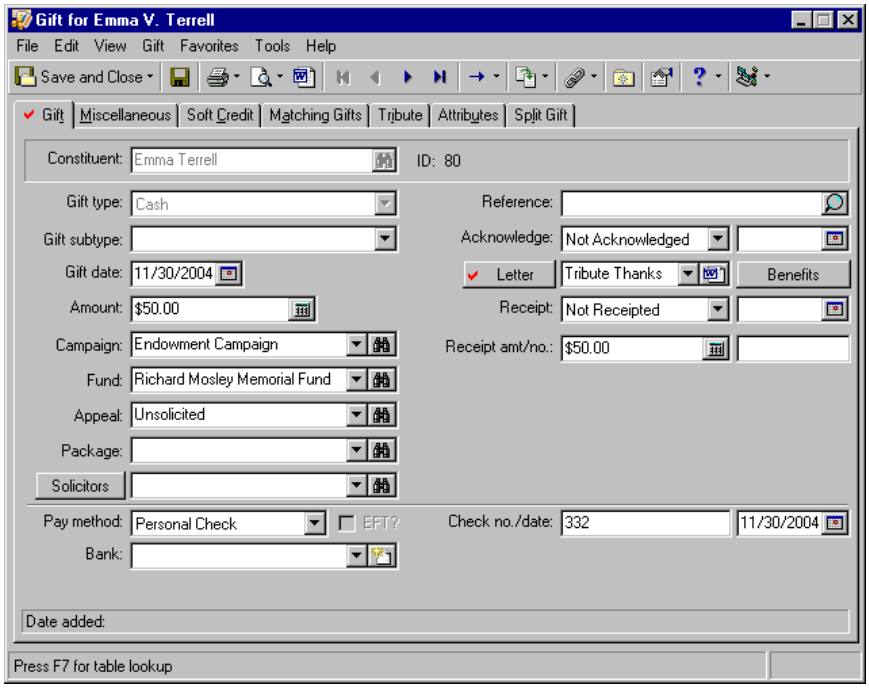
Scenario: On 11/30/2004, Emma Terrell donated $50 to your Richard Mosely Memorial Fund using a personal check. On 12/06/2004, the bank informs you Emma does not have enough money in her account to donate the gift. Because you already added a gift record to the database for Emma’s gift, you need to adjust the gift record to show your organization did not receive any money from the transaction.

1. From Emma Terrell’s constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

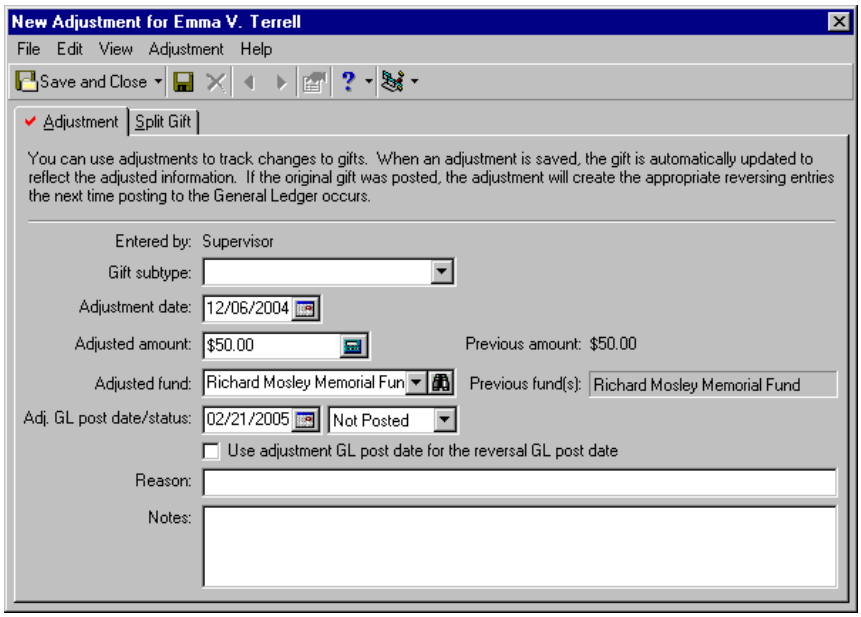


2. In the grid, select Emma’s $50 gift to the Richard Mosely Memorial Fund donated on 11/30/2004.

3. Click **Open** on the action bar. The gift record appears.

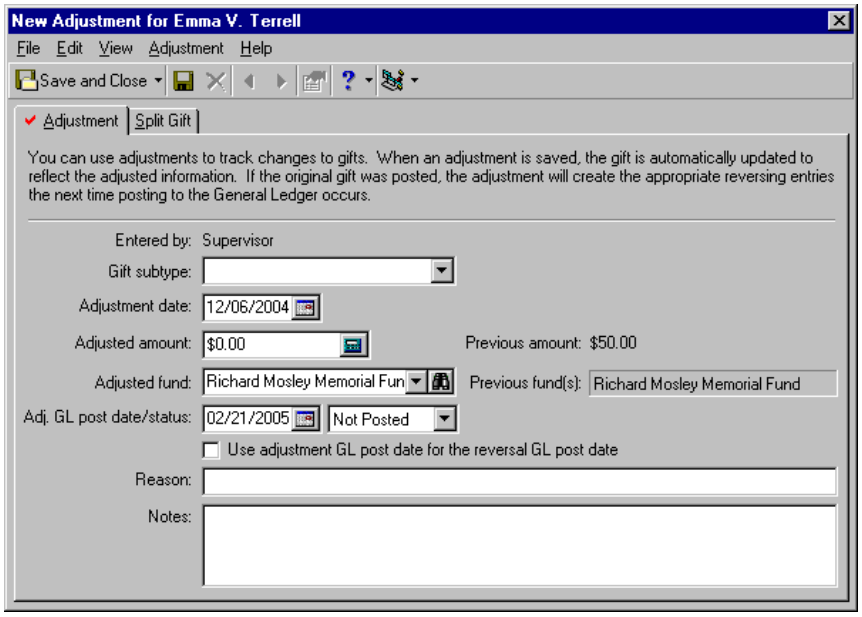


4. From the menu bar, select **Gift**, **Adjust**. The New Adjustment screen appears.



5. In the **Adjustment date** field, enter today's date, which is 12/06/2004.
6. In the **Adjustment amount** field, enter the amount $0 because you want to enter $0 in the **Amount** field on the gift record instead of the $50 originally entered.

7. In the **Adjustment fund** field, leave “Richard Mosely Memorial Fund” because you do not need to change the distribution of Emma’s gift.



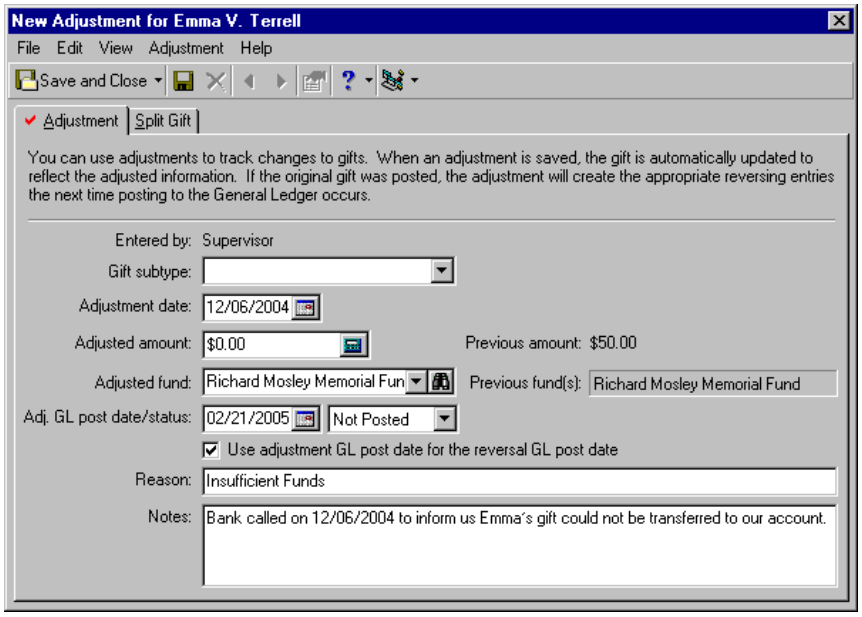
8. In the **Adj. GL post date/status** fields, enter the date 12/06/2004 and “Not Posted”. You plan to use the **Post to GL** option in *Administration* to post the adjustment to ***General Ledger***. For complete information on the process of posting to ***General Ledger***, see *The Raiser’s Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

9. Mark the **Use adjustment GL post date for reversal GL post date** checkbox if you want to use the general ledger post date on the adjustment record as the post date for the reversal transaction that is generated when the adjustment is posted to general ledger.

   When marking this checkbox, the general ledger post date for the reversal is the same as the general ledger post date for the adjustment. If this checkbox is not marked, the general ledger post date for the reversal is the general ledger post date on the Miscellaneous tab on the original gift record. For more information about reversals, see “Posting Gifts to Blackbaud’s General Ledger” on page 119 and *The Raiser’s Edge and The Financial Edge: An Integrated Solution for Nonprofits* guide.

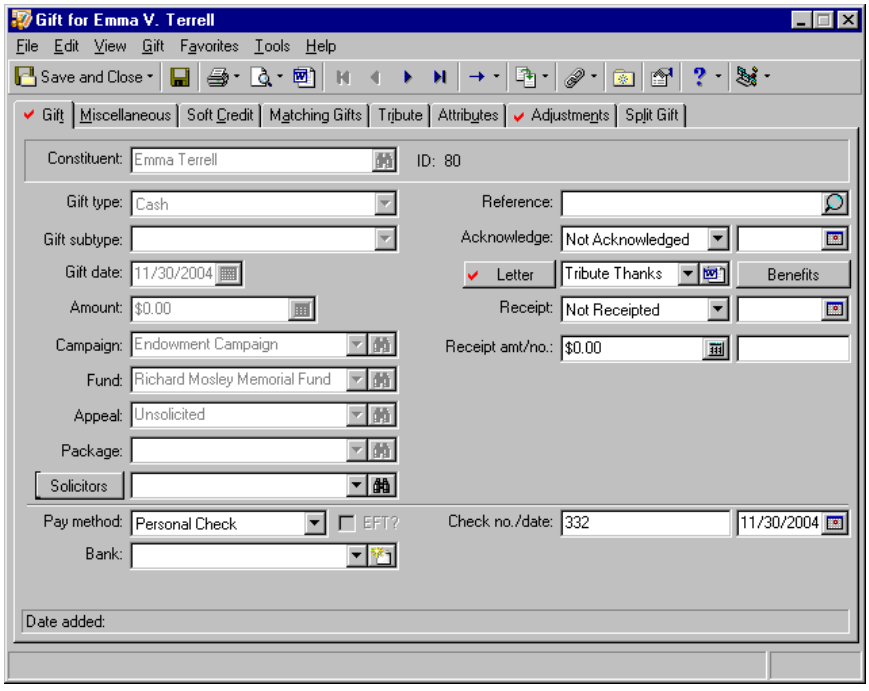
10. In the **Reason** field, enter “Insufficient Funds”.

11. In the **Notes** box, enter "Bank called on 12/06/2004 to inform us Emma's gift could not be transferred to our account."



Note: Because you are not changing the distribution of campaigns, funds, appeals, or packages, you do not need to enter information on the Split Gift tab.

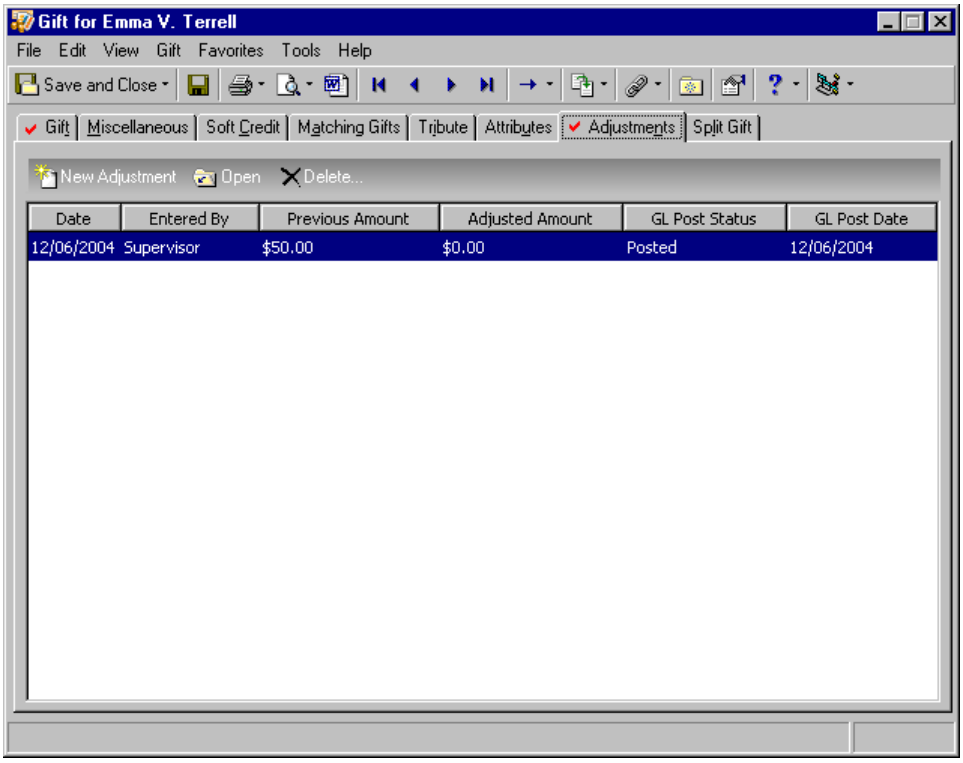
12. Click **Save and Close** on the action bar. You return to Emma's gift record. The **Amount** field is updated to show the gift amount entered on the adjustment record. "Adjustment Pending" now appears on the Miscellaneous tab because the adjustment has not yet been posted to the ***General Ledger***. Also, the Adjustments tab appears on the gift record so you can add additional adjustments for this gift and view, edit, and delete existing adjustments.



13. To save the changes and close the gift record, click **Save and Close** on the toolbar.

Adjustments Tab on a Gift Record

After you make an adjustment to a gift record, the Adjustments tab appears.



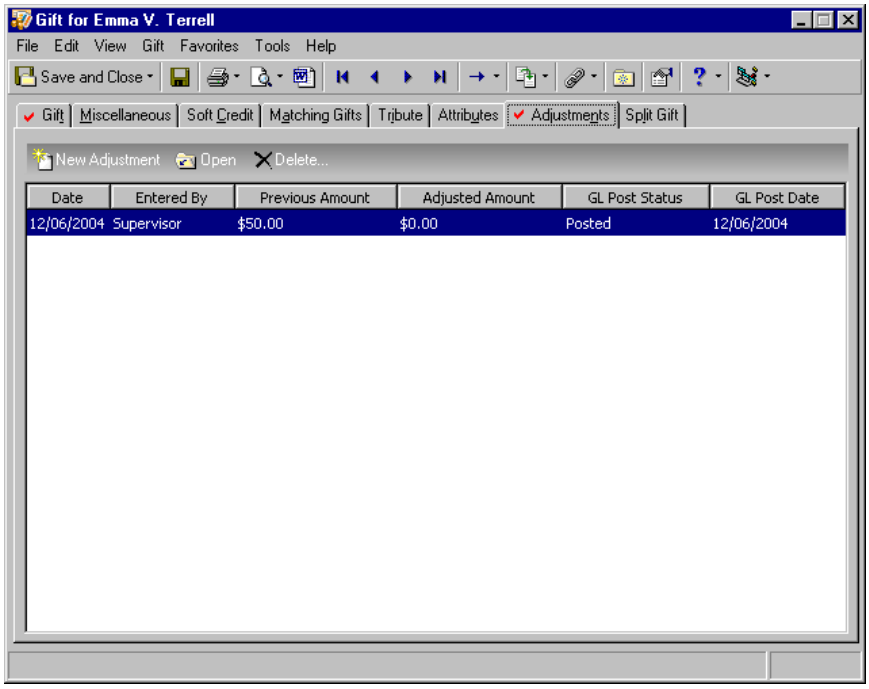
From the Adjustments tab, you can add additional adjustments, as well as edit and delete adjustments listed in the Adjustments grid. To add an additional adjustment, all previous adjustments must be posted to the ***General Ledger***. You can also open an adjustment to view information about a change. You can edit or delete an adjustment only if the adjustment has not been posted to the ***General Ledger***.

- **Adding additional adjustments to a gift record**

Note: If this is the first time you are adding an adjustment to this gift record, you need to open the gift record and select **Gift**, **Adjust** from the menu bar to create the new adjustment record. For more information, see “Adjusting a Gift” on page 91.

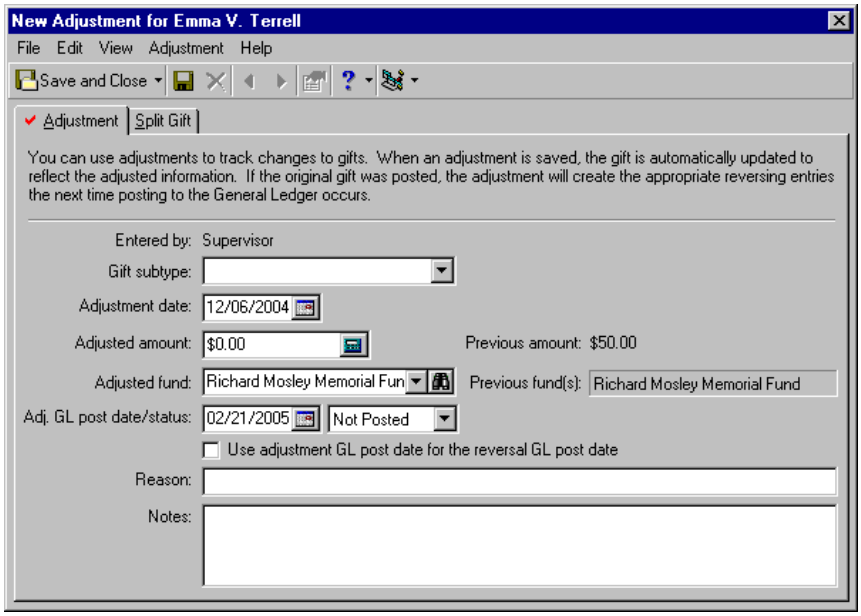
You can add an additional adjustment to a gift record only if all previous adjustments have been posted to the ***General Ledger***. If an adjustment has not been posted to the ***General Ledger***, "Adjustment Pending" appears on the Miscellaneous tab on the gift record.

1. From a gift record for which you want to add an additional adjustment record, select the Adjustments tab.



Note: If you do not have Blackbaud's ***General Ledger,*** you can still use the procedures in this section when adjusting a gift. However, if you want to make an additional adjustment, you need to post your gifts from the **Post to General Ledger** link in *Admin* to remove any Pending adjustments. For more information about the complete process of posting to ***General Ledger***, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

2. Click **New Adjustment** on the action bar. The New Adjustment screen appears.

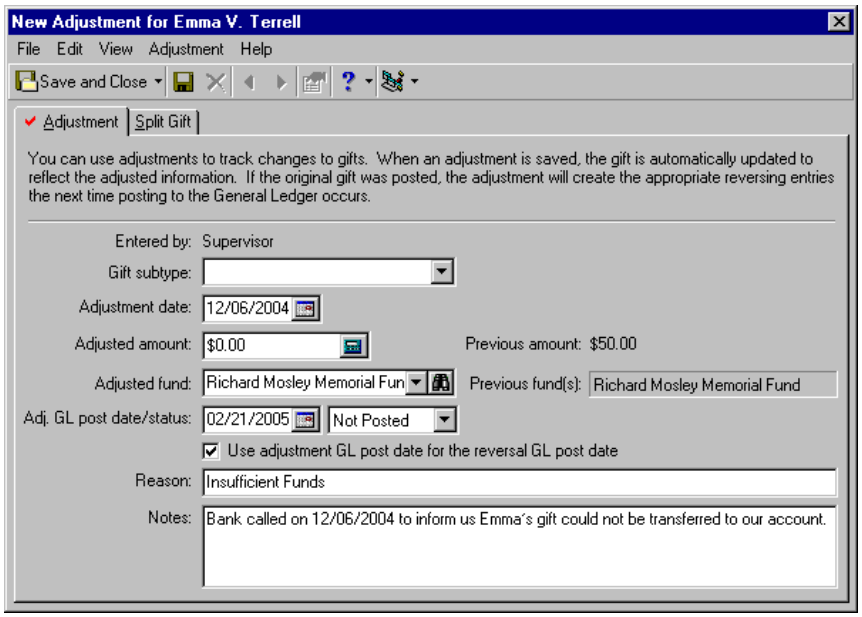


3. Add the information you want to adjust on the New Adjustment screen. For more information about these fields, see “Adjustment Tab” on page 92 and “Split Gift Tab” on page 93.
4. Click **Save and Close** on the toolbar to save the new adjustment and return to the Adjustments tab on the gift record.
5. To save the changes and close the gift record, click **Save and Close** on the toolbar.

Viewing or editing an existing adjustment

You can view an adjustment listed in the grid on the Adjustments tab regardless of whether the adjustment has been posted to the ***General Ledger***. An adjustment can be edited only if it has not been posted to the ***General Ledger***. If you need to edit a posted adjustment, you should add a new adjustment. For more information, see “Adding additional adjustments to a gift record” on page 98.

1. From the Adjustments tab of a gift record, select the adjustment you want to view or edit. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.
2. Click **Open** on the action bar. The Adjustment screen appears.

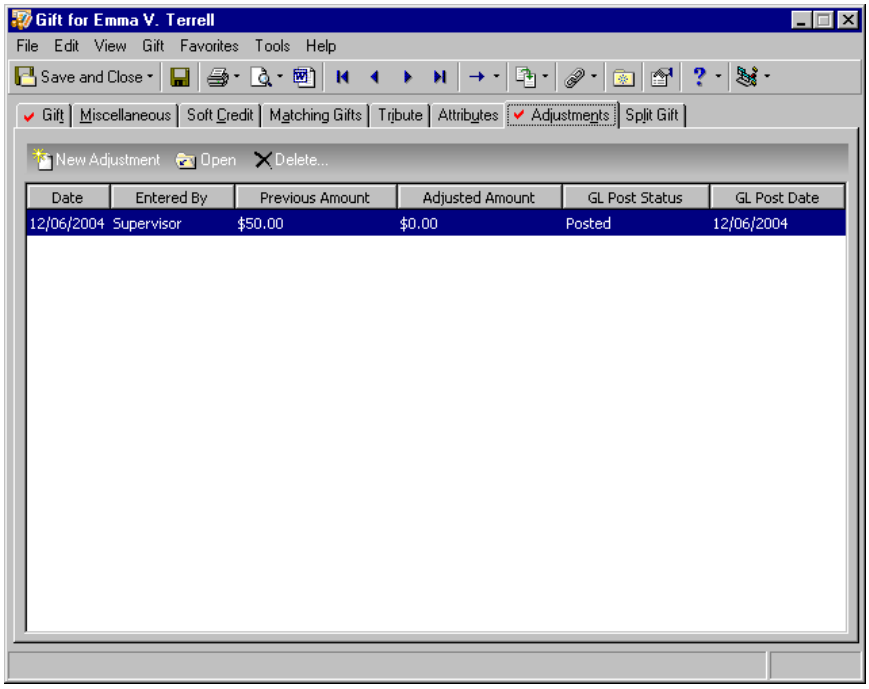


3. If the adjustment has not been posted to the ***General Ledger***, you can edit any necessary information.
4. Click **Save and Close** on the toolbar. You return to the gift record.
5. To save the changes and close the gift record, click **Save and Close** on the toolbar.

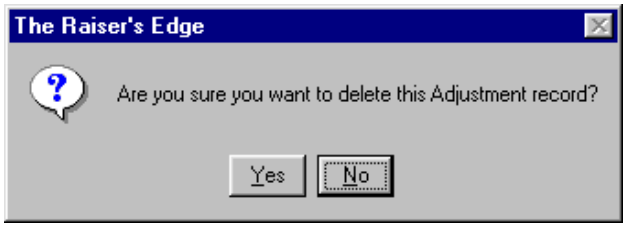
Deleting an adjustment from a gift record

You can delete an adjustment from a gift record only if the adjustment has not been posted to the ***General Ledger*** and you have appropriate security rights. If the adjustment has been posted to the ***General Ledger***, you need to add a new adjustment to reverse the adjustment you want to delete. For more information, see "Adding additional adjustments to a gift record" on page 98.

1. From the Adjustments tab of a gift record, select the adjustment you want to delete. For more information about opening a gift record, see "Accessing a Gift Record" on page 7.



2. Click **Delete** on the action bar. A message appears.



3. To delete the adjustment from the gift record, click **Yes**.

Creating an Acknowledgement Letter from a Gift Record

Note: On the Letters page, accessed from the **Letters** link of *Configuration*, you can set up the letters you use at your organization. You can create merge documents from ***The Raiser's Edge***, link letters you create from Microsoft *Word* to ***The Raiser's Edge***, and edit your merge fields. For more information about the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

In ***The Raiser's Edge***, if you use Microsoft *Word*, you can create a single acknowledgement letter from a gift record using the Word icon in the **Letter** field. To create a customized acknowledgement letter from a gift record, you can select the merge fields you want to export out of ***The Raiser's Edge*** to use within your letter and create the merge document from the **Letters** link of *Configuration*. Then, you can select the letter from the **Letter** field and click the Microsoft *Word* icon on a gift record to automate the merge process. For more information about creating an export for your letter and creating the merge document in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

For example, Frances Mills donates an unsolicited cash gift of $5,000 to your organization. To show your appreciation, you want to immediately send a personal acknowledgement letter thanking Frances for her generous gift. Instead of creating an acknowledgement letter for this one gift in *Mail*, you quickly generate the letter from the Word icon on Frances's gift record.

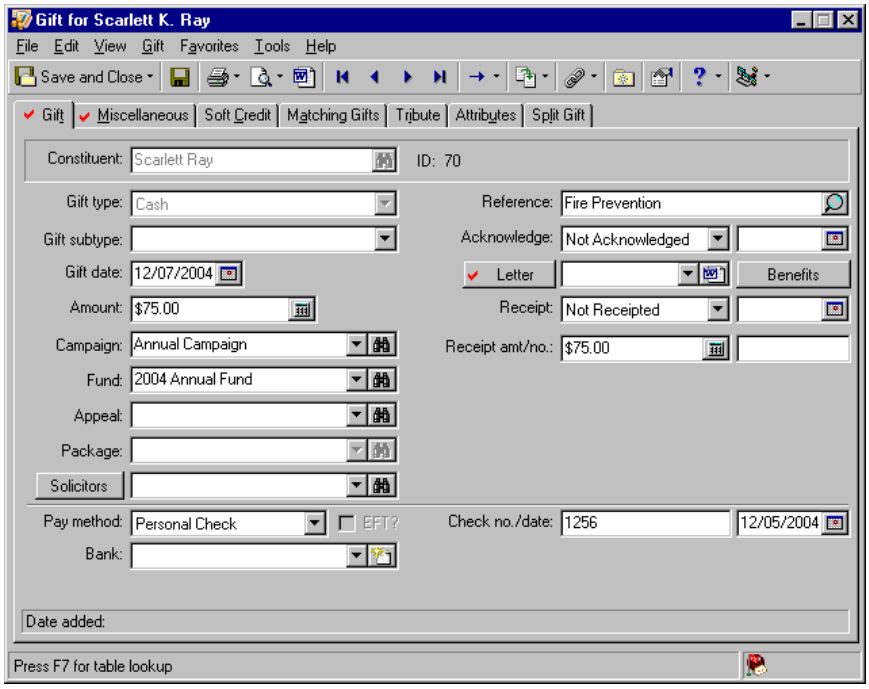
- **Creating a new acknowledgement letter from the gift record**

  If you use Microsoft *Word*, you can create an acknowledgement letter from the Word icon of a gift record. To create a customized acknowledgement letter from a gift record, you can select the merge fields you want to export out of ***The Raiser's Edge*** to use within your letter in and create the merge document from **Letters** in *Configuration*. Then, you select the letter from the **Letter** field and click the Microsoft *Word* icon on a gift record to automate the merge process. For more information about creating your export for your letter and creating the merge document in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

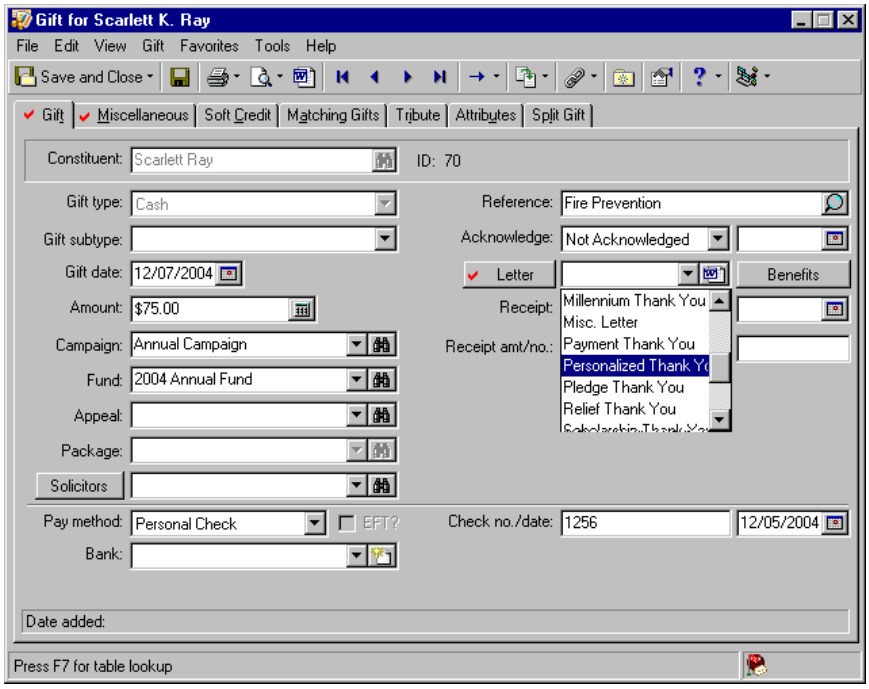
  Scenario: Scarlett Ray sends you a check for $75.00 on 12/07/2004 and requests that your organization use her money for the Fire Prevention event. You recently met Scarlett at a drop-in and want to write her a personal letter acknowledging her gift and telling her you enjoyed meeting her. From her gift record, generate a personal acknowledgement letter using the Microsoft *Word* icon.

Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using ***The Raiser's Edge***. To take full advantage of the enhanced features, you must have *Word 2000* or *Word XP* installed on your computer.

1. Open Scarlett's 12/07/2004 gift record to generate an acknowledgement letter. For more information about opening a gift record, see "Accessing a Gift Record" on page 7. The gift record appears.

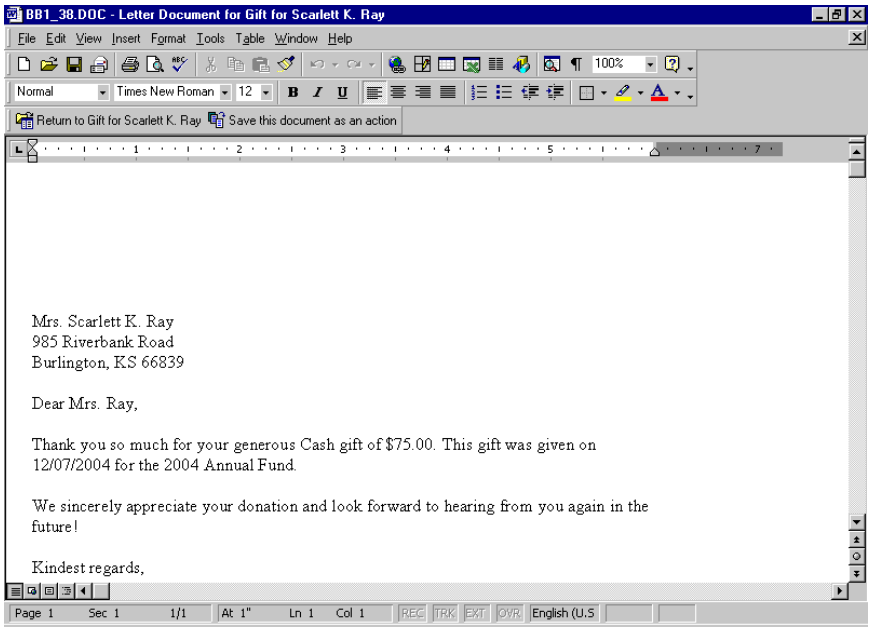


2. In the **Letter** field, select "Personalized Thank You". In *Configuration*, you defined the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.



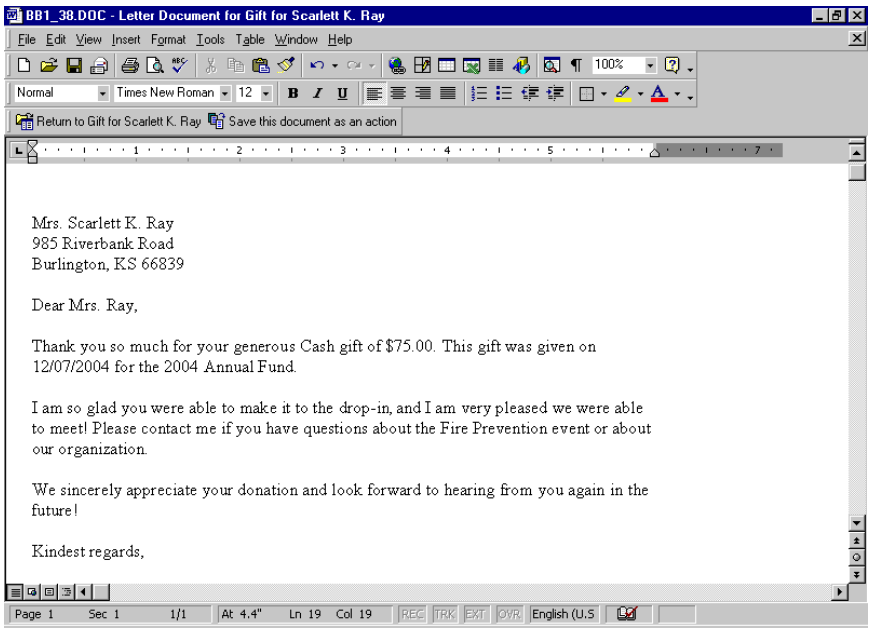
Note: You can also use the Microsoft *Word* icon on the gift record toolbar to generate your acknowledgement letters.

3. In the **Letter** field, click the Microsoft *Word* icon. *Word* opens and your letter appears.

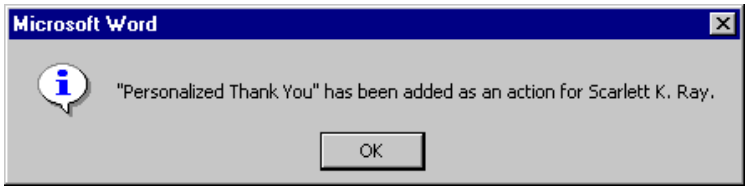


Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in ***The Raiser's Edge***. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT** + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

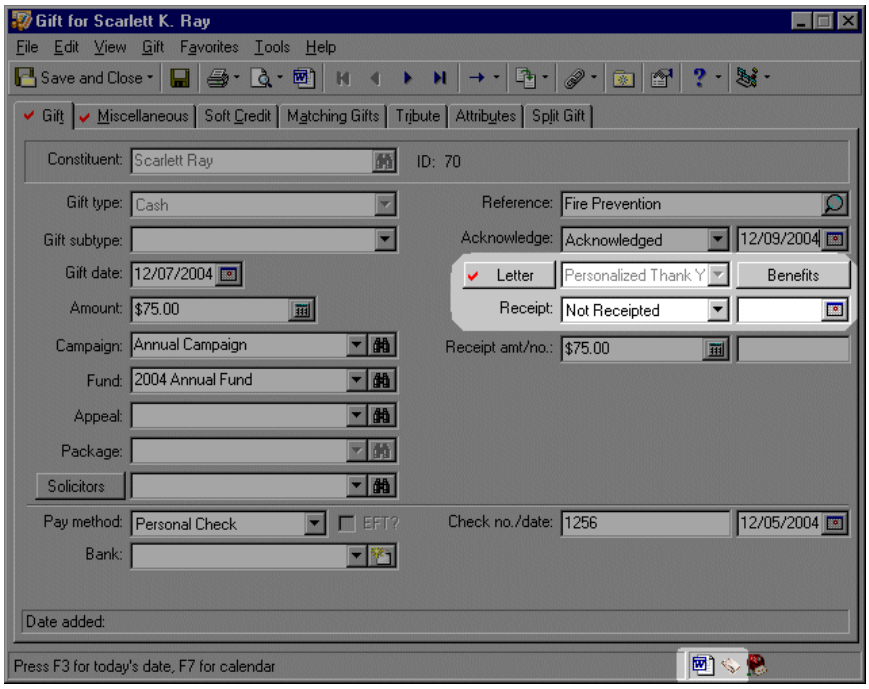
4. Add the additional personalized information you want for Scarlett's letter. For example, you can write "I am so glad you were able to make it to the drop-in and I am very pleased we were able to meet! Please contact me if you have any questions about the Fire Prevention event or about our organization."



5. To save the letter in an action record, click **Save this document as an action** on the Microsoft *Word* toolbar. A message appears, stating the letter has been saved as an action.



6. Click **OK**. Your return to the Microsoft *Word* letter screen.
7. To print the letter, select **File**, **Print** from the Microsoft *Word* menu bar.
8. Once the letter is printed, click **Return to Gift for Scarlett K. Ray** on the Microsoft *Word* toolbar. You return to Scarlett's gift record. The **Acknowledge** field automatically defaults "Acknowledged" and the day's date you are writing the letter on. The **Letter** field is disabled.



Also note the Microsoft *Word* and action record icons appear in the bottom right status bar.

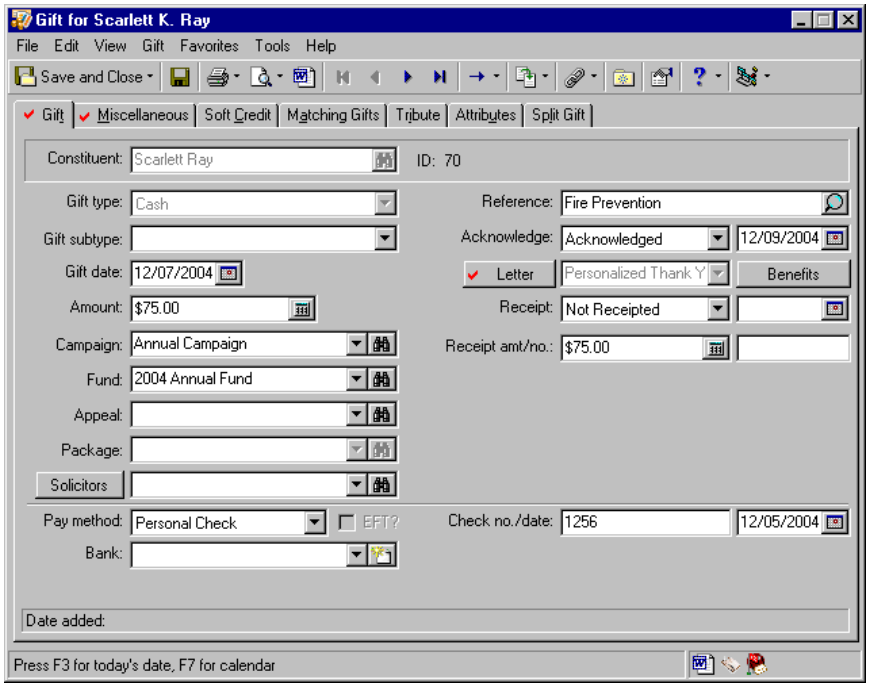
9. To save and close the gift record, click **Save and Close** on the toolbar.

Editing merge field information from the gift record

You can edit the acknowledgement letter you created from a gift record, from the same gift record. If you need to edit the merge fields you export for the letter, you should edit the letter in *Configuration*. For more information about editing letters from the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

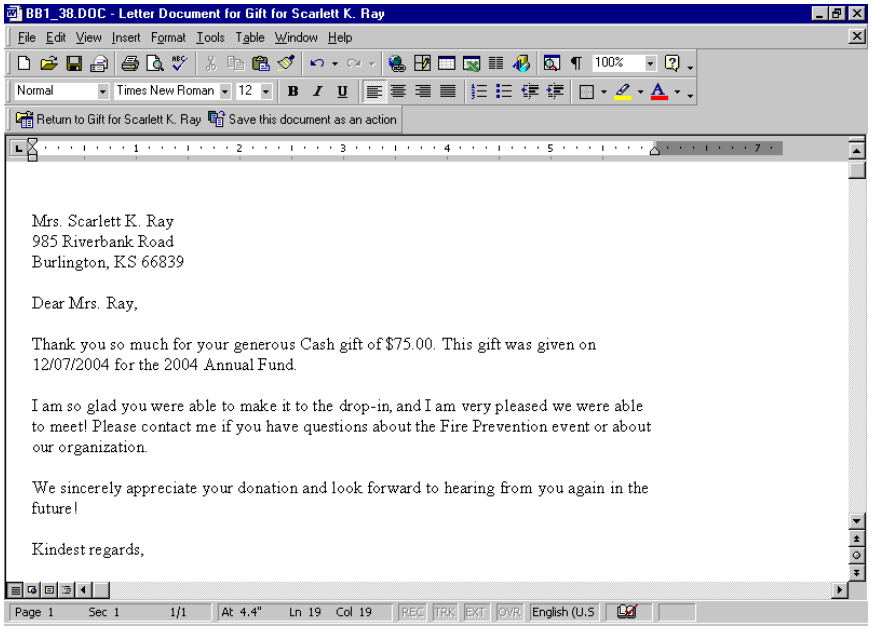
Scenario: When you personalized Scarlett's acknowledgement letter for her 12/07/2004 gift, you forgot to mention that another drop-in is being held next Thursday. You have not mailed her letter yet, so you want to edit the letter to include this information. From the gift record, open the Microsoft *Word* document to edit your letter. This scenario uses the letter created in "Creating a new acknowledgement letter from the gift record" on page 102.

1. To edit the linked acknowledgement letter, open Scarlett's 12/07/2004 gift record. For more information about opening a gift record, see "Accessing a Gift Record" on page 7. The gift record appears.

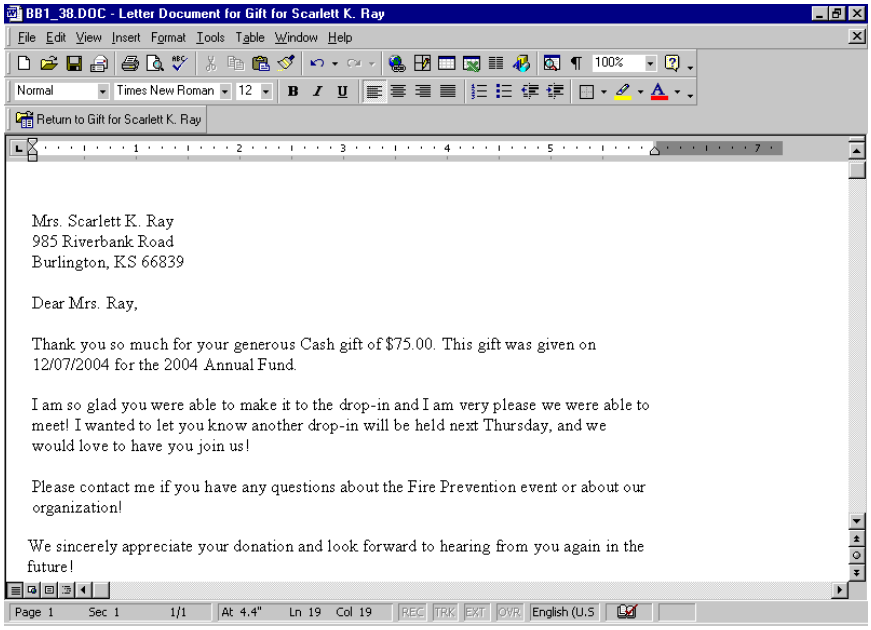


Note: To open the action record for this acknowledgement letter, click the action record icon in the same right corner of the status bar.

2. Click the Microsoft *Word* icon in the lower right corner of the status bar. Your gift acknowledgement letter appears.



3. Add the additional text to notify Scarlett of the drop-in for next Thursday.



Note: To print the letter, select **File**, **Print** from the Microsoft *Word* menu bar.

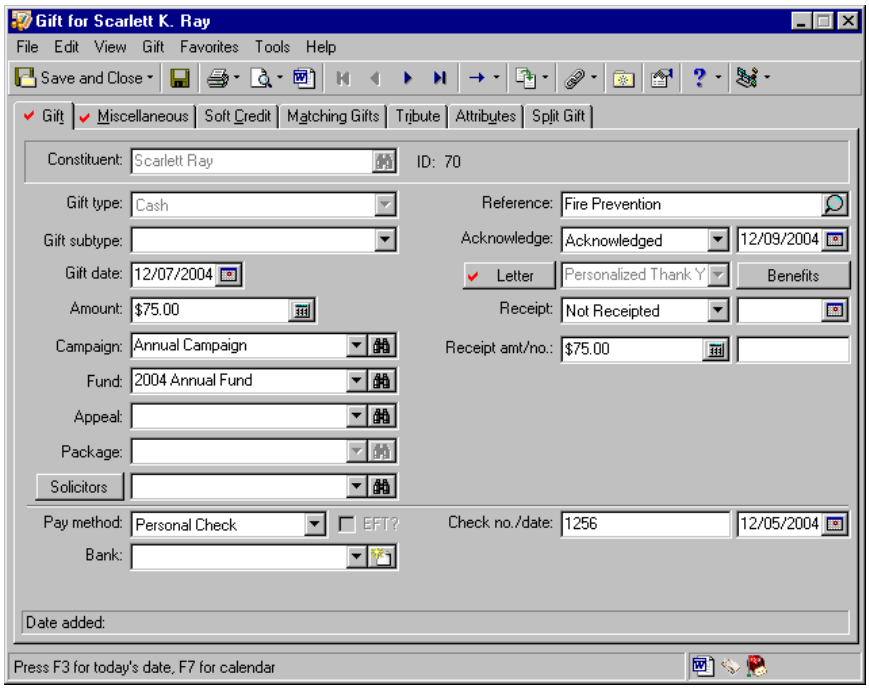
4. After your changes are complete, click **Return to Gift for Scarlett K. Ray** on the Microsoft *Word* toolbar.
5. To save and close the gift record, click **Save and Close** on the toolbar.

Removing a letter from the gift record

When you remove a letter from the gift record, this must be done by deleting the linked action record. This is because an acknowledgement letter created from a gift record is stored in an action record.

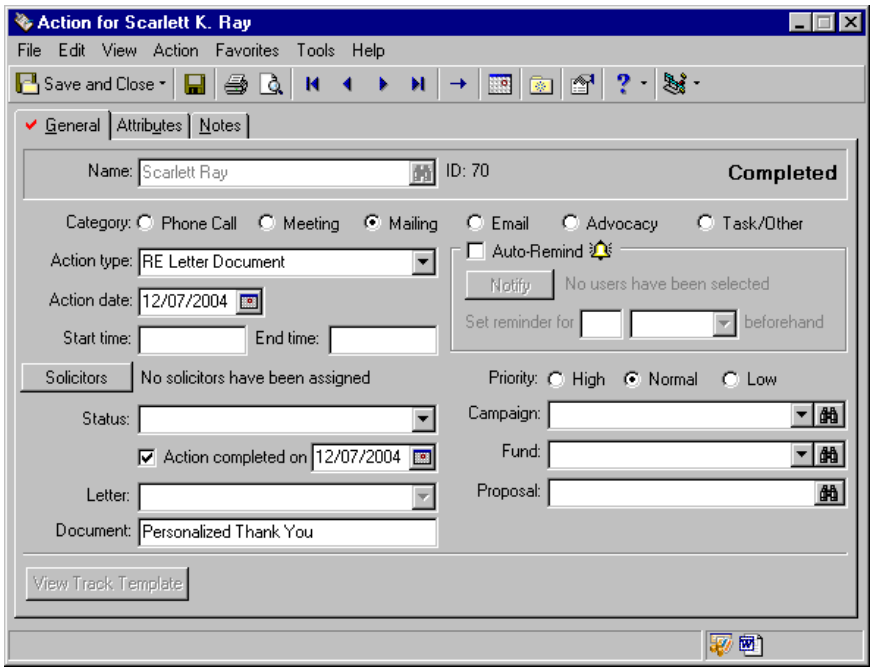
Scenario: You decide at the last minute you do not want to send Scarlett the "Personalized Thank You" letter. Instead, you want to change the **Acknowledge** field to "Not Acknowledged" so you can send her letter the next time you run the Donor Acknowledgement Letters mail task in *Mail*. Delete the action record linked to Scarlett's 12/07/2004 gift to unlink the current acknowledgement letter. This scenario uses the letter created in "Creating a new acknowledgement letter from the gift record" on page 102.

1. Open Scarlett's 12/07/2004 gift record to access the linked action record the Microsoft *Word* letter is stored. For more information about opening a gift record, see "Accessing a Gift Record" on page 7. The gift record appears.



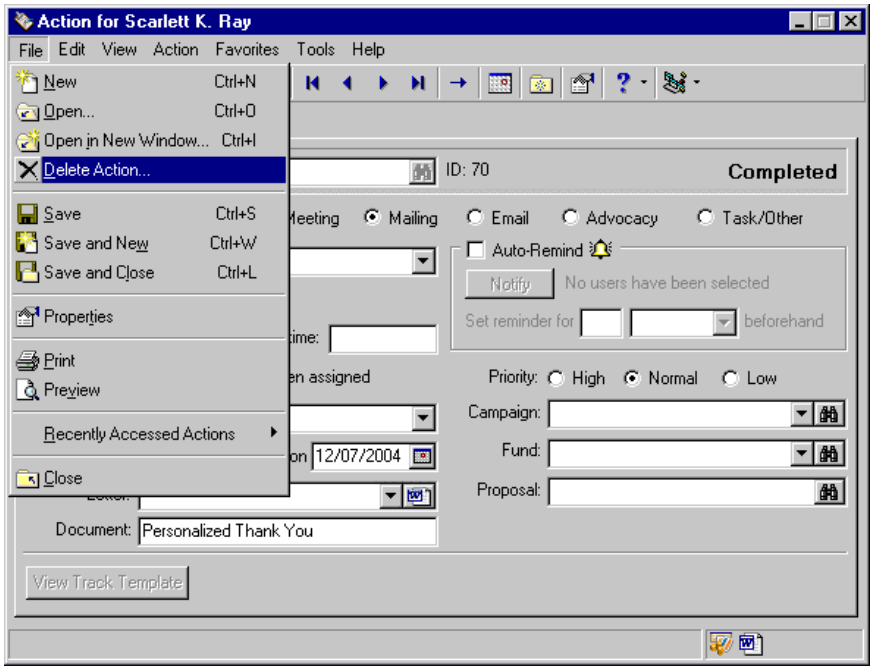
Note: To open the acknowledgement letter in *Word*, click the Microsoft *Word* icon in the same right corner of the status bar.

2. Click the action record icon in the lower right corner of the status bar. The action record appears.

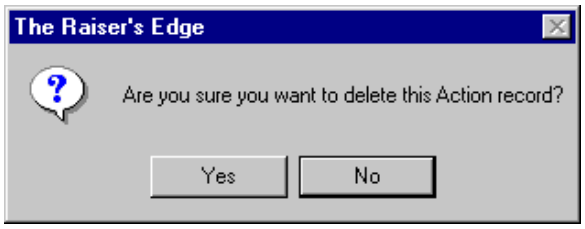


Note: You can also access the acknowledgement letter from the lower right corner of the status bar on the action record.

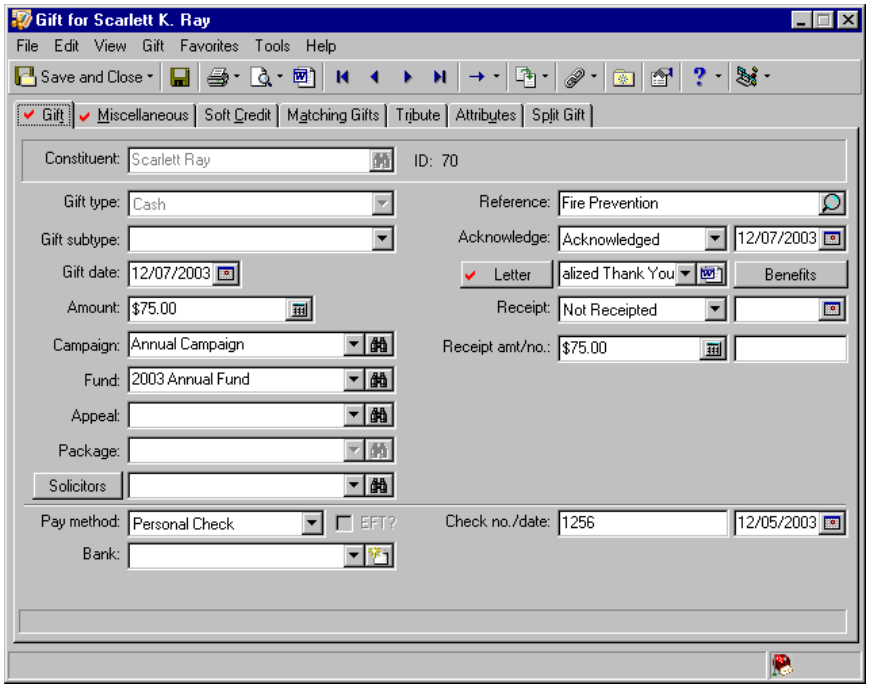
3. To remove the Microsoft *Word* acknowledgement letter, select **File**, **Delete Action** from the menu bar.



A message appears, asking if you are sure you want to delete the action record.



4. Click **Yes**. You return to the gift record. The **Acknowledge** field information remains the same, but the **Letter** field becomes enabled.



5. So the Donor Acknowledgement Letters mail task processes Scarlett's letter, select "Not Acknowledged" in the **Acknowledge** field.
6. In the **Letter** field, select "Annual Giving Thank You". You want to use this letter when you process Donor Acknowledgement Letters in *Mail*.
7. On the toolbar, click **Save and Close**.

Posting to General Ledger

The Raiser's Edge makes it easy for you to post gifts to Blackbaud's ***General Ledger*** program. In ***The Raiser's Edge***, you can create a file consisting of the gift transactions you want to post. This file can then be moved into the fund accounting software using **Post to General Ledger** link in *Administration*. This section provides information about linking and posting gifts from ***The Raiser's Edge*** to ***General Ledger***.

Linking The Raiser's Edge to Blackbaud's General Ledger

You can establish program settings for the interface between ***The Raiser's Edge*** and Blackbaud's ***General Ledger***. These settings enable the two programs to work together so you can save time by entering gifts once for both programs. If you have ***General Ledger***, you must specify the location of its database and whether it is a single or multi-user version. You can specify that ***General Ledger*** automatically check the validity of account and project information entered into ***The Raiser's Edge***. You can also define journal reference fields to use in the **Post to General Ledger** link of *Administration* for posting detailed gift transactions.

If you have Blackbaud's ***General Ledger*** and ***The Financial Edge*** installed on the same workstation, you can enter ***General Ledger*** information used in ***The Raiser's Edge*** Accountability Summary. Additionally, you can specify that a ***Financial Edge*** Transaction Code be placed on all appeal and (if you have the optional module *Event Management*) event records you add in ***The Raiser's Edge***. That way, you can associate ***Financial Edge*** expenses with your ***Raiser's Edge*** appeals and events.

If you do not have ***General Ledger***, you can still use this link to send transaction details to your accounting software and print a report of posted transactions.

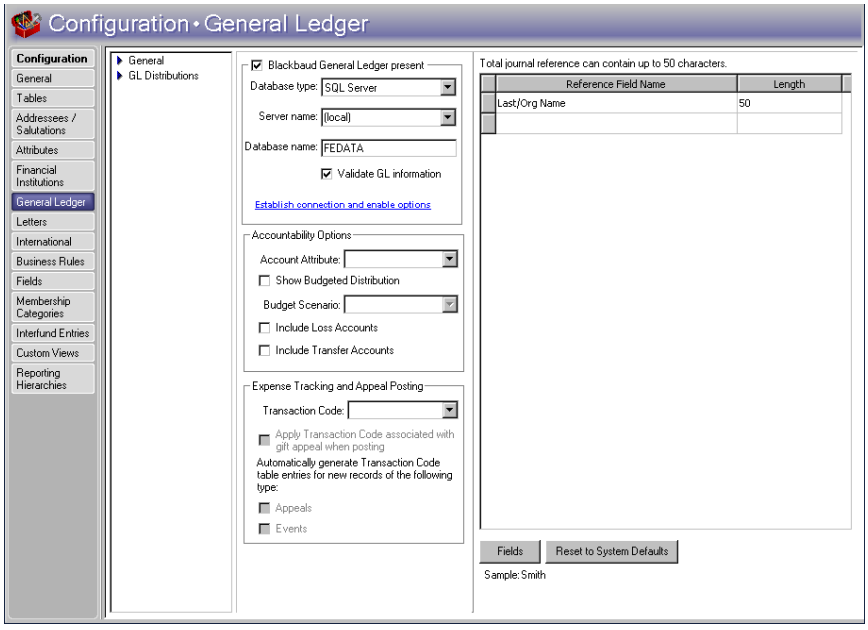
- **Establishing settings for the interface between The Raiser's Edge and General Ledger**

  All options for setting the interface between ***General Ledger*** and ***The Raiser's Edge*** are located on the General Ledger page of *Configuration*. The information you enter on this screen is used in gift and fund records, queries, exports, and the **Post to General Ledger** option in *Administration*.

  1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

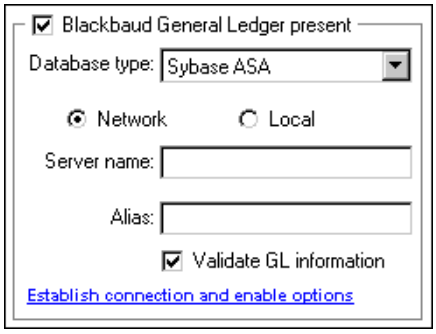
Note: If you have ***The Financial Edge*** and use *Projects & Grants* installed on the same workstation, you can process the Accountability Summary in ***The Raiser's Edge***. In addition, you must have logged into ***The Financial Edge*** at least once. The Accountability Summary creates a report that communicates to your donors how gifts they donate are spent or budgeted to be spent. To access the summary, select **Summaries**, **Accountability Summary** from the **View** menu on a gift record. For more information about the summary, see the Accountability Summary chapter in the *Summaries Guide*. For more information about ***The Financial Edge***, contact solutions@blackbaud.com.

  2. Click **General Ledger**. The General Ledger page appears.



  3. In the upper left frame, mark **Blackbaud General Ledger present**.

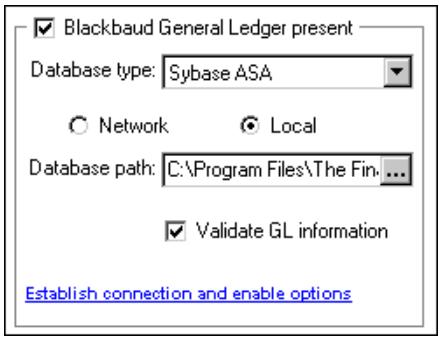
4. In the **Database type** field, select the type of database your version of ***General Ledger*** uses. If you are using ***General Ledger*** 6.x or a version of ***The Financial Edge*** prior to 7.2, select "Sybase ASA" and proceed to the next step of this procedure. If you are using ***The Financial Edge*** 7.2 or later, select "SQL Server" and skip to step 11.
5. You must select whether your database is accessed by many computers through a network, or by only your computer. If you have a multi-user version of ***General Ledger***, mark the **Network** option.



6. Enter the **Server name** for your ***General Ledger*** database engine. This name is required because it allows ***The Raiser's Edge*** to establish a link with the ***General Ledger*** Sybase ASA database.

Note: Your network administrator should be able to supply you with your **Server name** and **Alias** if you do not know it.

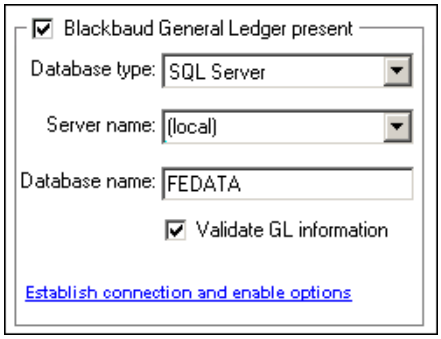
7. If you are using an alias for your ***General Ledger*** database, enter it in the **Alias** field. All computers on your network use this name to locate the database linking ***The Raiser's Edge*** and ***General Ledger***.
8. If you have a single user version of ***General Ledger***, mark the **Local** option.



9. The **Database path** to ***General Ledger*** is required. You need to enter the path to the Blackbaud database file folder in ***General Ledger***. If necessary, you can click the **Browse** button to find the path to the folder.
10. To test the connection to ***The Financial Edge*** database, click the **Establish connection and enable options** link. If the connection is successful, a message appears informing you of this and the **Accountability Options** and **Expense Tracking Options** frames appear.

    After you specify your Sybase ASA database, skip to step 14 of this procedure.

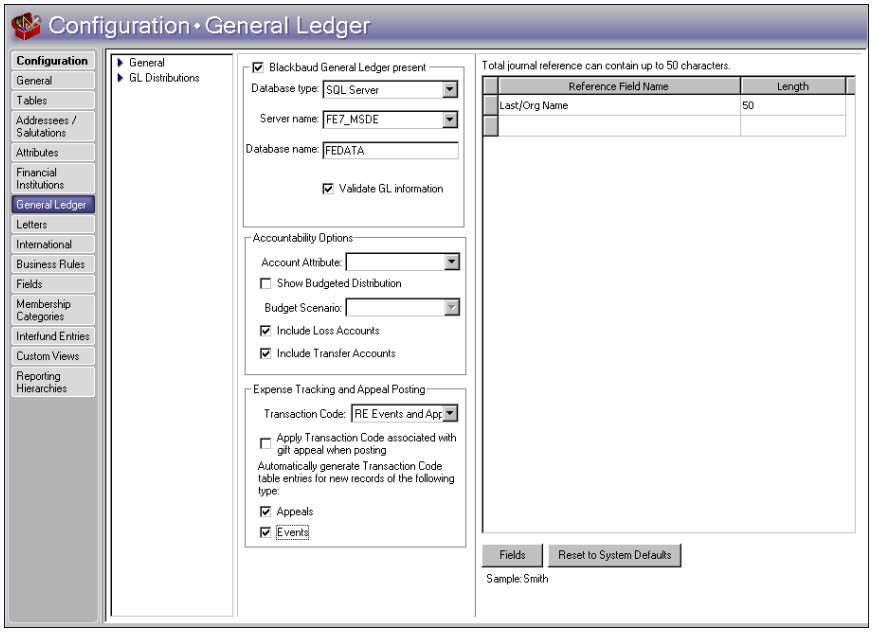
11. When you select “SQL Server” as the **Database type** to establish a link with ***The Financial Edge*** 7.2, several fields appear.



Warning: If you previously linked to a Sybase ASA database with another version of ***General Ledger***, and the database to which you linked is still available, you must log out of ***The Raiser’s Edge*** and log back in before you will be connected to your SQL Server database.

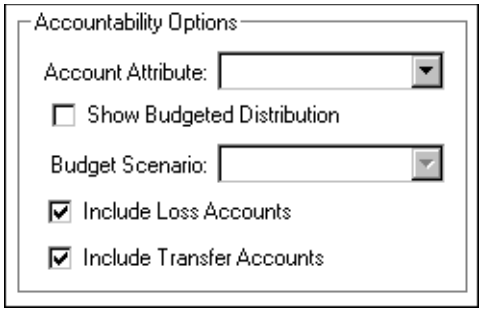
12. In the **Server name** field, select the server on which your ***Financial Edge*** SQL Server database resides. Enter the name of the database to which you are connecting in the **Database name** field.
13. If you mark **Validate GL information**, ***The Raiser’s Edge*** searches the ***Financial Edge*** database to determine whether the account and project numbers you enter in ***The Raiser’s Edge*** exist. Marking this checkbox helps prevent errors caused by incorrectly entered numbers.
14. To test ***The Financial Edge*** database connection, click the **Establish connection and enable options** link. If the connection is successful, a message appears informing you of this and the **Accountability Options** and **Expense Tracking Options** frames appear.

    The **Establish connection and enable options** link disappears after a confirmation message that the connection to ***The Financial Edge*** has been made.



To run the Accountability Summary, ***The Financial Edge*** must be installed on the same workstation as ***The Raiser’s Edge***, and you must have logged into ***The Financial Edge*** at least once.

15. You need to enter information in the **Accountability Options** frame only if you want to run the Accountability Summary. If you intend to run the summary, you must specify information from ***The Financial Edge*** that will be used in the Accountability Summary.



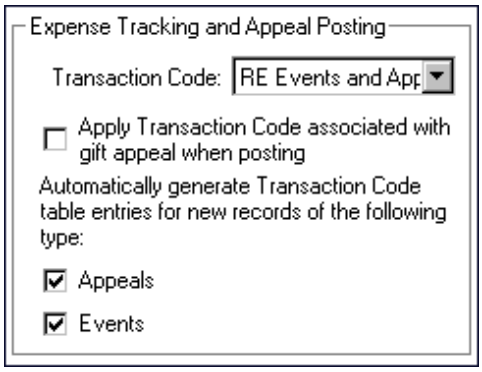
In the **Account Attribute** field, select the attribute you established in ***The Financial Edge*** to group accounts together. This must be a "table" type attribute. The table entry values will appear in the Accountability Summary.

16. Mark the **Show Budgeted Distribution** checkbox if you want to view budget distribution information on the Accountability Summary. When you mark this checkbox, you must select an entry in the **Budget Scenario** field. Budget scenarios are established in ***The Financial Edge*** and used in the Accountability Summary to show how a gift will be spent based on how a given project is budgeted.

    A budget scenario is a single version of an organization's budget for a given fiscal year. You can create multiple budget scenarios if you have ***The Financial Edge*** optional module *Budget Management*. For example, you can create a scenario of your original budget and also create scenarios for various revisions of that budget.

17. If you want ***The Raiser's Edge*** to look at transactions in ***Financial Edge*** transfer and loss accounts when it determines how money donated to a fund is spent, mark the **Include Loss Accounts** and **Include Transfer Accounts** checkboxes. You can mark one, both, or neither of these checkboxes.

18. The **Expense Tracking Options** frame is available only if you specified a SQL Server database in the **Database type** field. You need to enter information in the **Expense Tracking Options** frame only if you want to include ***Financial Edge*** transaction codes on new appeal and event records you add (if you have the optional module *Event Management*). By including transaction codes on these records, you can use the codes to track ***Financial Edge*** expenses for the records.



Note: In ***The Financial Edge***, a transaction code helps categorize information for reporting and closing fiscal years. Transaction codes are available with ***The Financial Edge*** optional module *Projects and Grants*.

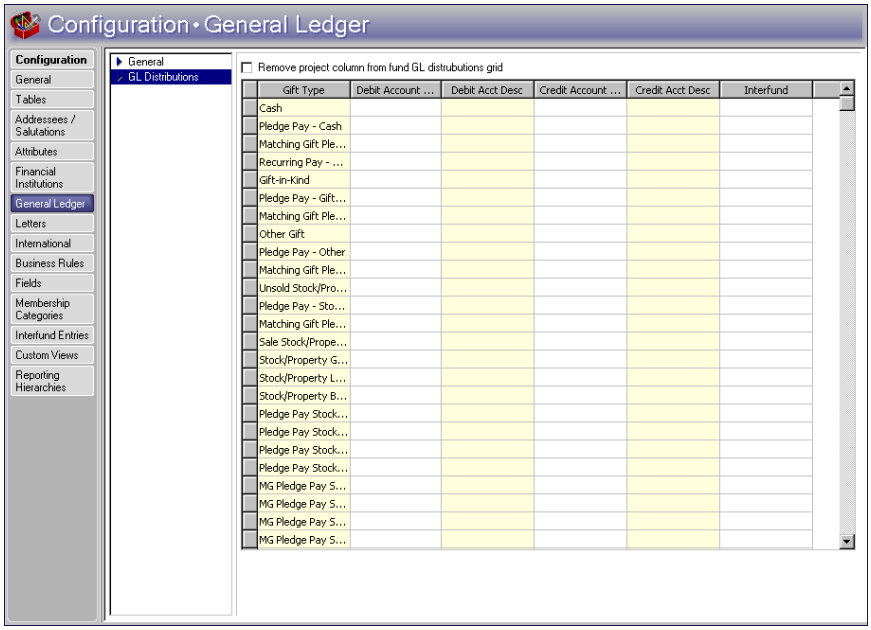
All transaction codes you established in ***The Financial Edge*** appear in the **Transaction Code** dropdown list. We recommend you create a transaction code in ***The Financial Edge*** especially for your ***Raiser's Edge*** appeal and event records.

Mark the **Apply Transaction Code associated with gift appeal when posting** checkbox to post gifts for a given appeal with the transaction code you select in the **Transaction Code** field.

When you select a transaction code and mark the **Appeals** and **Events** checkboxes, a **Financial Edge Transaction Code** field and **View GL Expenses** button become available on the appeal record Attributes/Expenses tab and event record Expenses tab. When you save a new appeal or event, a table entry is created in ***The Financial Edge*** for the selected transaction code. The table entry equals the name of the appeal or event. The table entry also appears on the appeal or event record in the **Financial Edge Transaction Code** field.

In ***The Financial Edge***, you can associate ***General Ledger*** expenses with individual transaction code table entries. You can view any ***Financial Edge*** expenses you associate with a transaction code table entry for an event or appeal by clicking the **View GL Expenses** button on the Expenses tab of the appeal or event record (if you have the optional module *Event Management*).

19. From the treeview on the left, select **GL Distributions**. The **GL distributions** grid displays.



If your fund has more than one project distribution, we recommend you select one project for each fund on the GL Distributions tab on the fund record. If you do not select one project per fund, it is important to remember that the project assigned to the gift type of Cash is applied to the fund record when posting to ***The Financial Edge***. If you do select one project per fund, mark the **Remove Project column from GL Distributions grid** to remove the **Project** column from the GL Distributions tab on the fund record.

20. The **Remove Project column from fund GL Distributions grid** checkbox displays if you have funds with more than one project distribution (for example, a separate project distribution for each gift type for one fund). To clean up your project distributions by designating one project per fund, mark this checkbox. This removes the **Project** column from the GL Distributions tab on the fund record. Then, on this same GL Distributions tab, you can select one project for the fund.

    If you do not have more than one project distribution for each fund, the **Remove Project column from fund GL Distributions grid** checkbox does not display.

21. In the **GL distributions** grid, you can establish default settings for the GL Distributions tab on a new fund record. These defaults can be set up for each gift type in the columns of **Debit Account Number**, **Debit Account Desc**, **Credit Account Number**, **Credit Account Desc**, and **Interfund**. When you add a new fund record, any information you enter in the **GL distributions** grid displays automatically on the GL Distributions tab on a new fund record. When you are creating the new fund record, you can change the GL information on the GL Distributions tab.

22. When you leave the General Ledger page, the program saves the settings automatically.

Interfund Entries

The **Interfund Entries** link is visible only if you have Blackbaud's ***General Ledger*** and you have established a link between it and ***The Raiser's Edge*** from the **General Ledger** link in *Configuration*. You can specify ***General Ledger*** transfer accounts and quickly access and enter them into the GL Distributions grid on fund records.

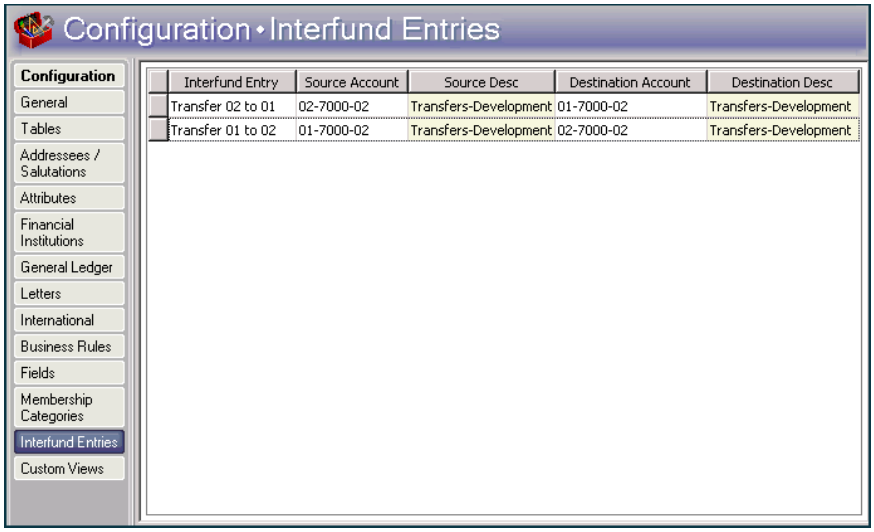
If the fund segment of a ***General Ledger*** debit and credit account are different, the ***General Ledger*** funds they belong to are different. In this case, a transfer account must be specified. The interfund transfer ensures that posted debits and credits associated with a gift are balanced by ***General Ledger*** fund when the debit is to one fund and the credit to another. For example, if you post a debit to the ***General Ledger*** Playground Fund and a credit to the ***General Ledger*** Operating Fund both from the ***The Raiser's Edge*** General Fund, an interfund entry is needed to create an offsetting or balancing credit to the ***General Ledger*** Playground Fund and a balancing debit to the ***General Ledger*** General Operating Fund.

You can access account numbers directly from the ***General Ledger*** database by clicking the binoculars or pressing **F7** on your keyboard. The accounts you define here appear in the list of entries when you click the down arrow in the **Interfund** column of GL Distribution grids. For more information on transfer accounts and interfund entries, see the *Configuration Guide for General Ledger 7*.

Adding an interfund entry

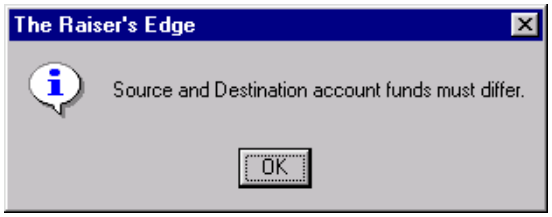
You can specify a transfer account to link debit and credit accounts from different ***General Ledger*** funds.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click the **Interfund Entries** link. The Interfund Entries page appears.



3. In the **Interfund Entry** column, give the entry a name of up to thirty characters. This name appears in the list of possible entries when you click the down arrow in the **Transfer** column of a GL Distributions grid on a fund record.

4. In the **Source Account** and **Destination Account** columns, you can click the binoculars to search the ***General Ledger*** database for account numbers. The account descriptions appear when you enter an account number. The descriptions are defined in ***General Ledger*** and cannot be edited in ***The Raiser's Edge***. The source and destination account numbers must be in different GL funds. If you select the same account numbers, a message appears.



To return to the Interfund Entries page, click **OK**.

Note: You can select which character to use as a placeholder for any missing digits in a ***General Ledger*** account number on the Records tab of User Options.

5. If you click the down arrow in the **Source Account** or **Destination Account** columns, a dropdown box appears. The contents of the box break down a ***General Ledger*** account number by **Segment**.

Segment	Value	Description
Fund	01	UNRESTRICTED O...
Account Number	213200	
Expense Category	05	Equipment Repair
Department/Cost...	01	Administration

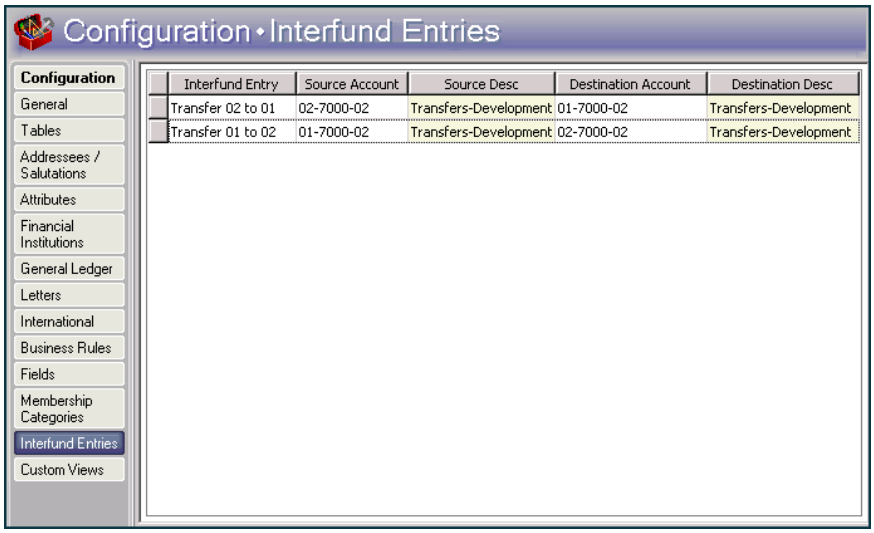
6. Using the above example, the **Segment** column breaks the account number into ***General Ledger*** fund (first two numbers), account number (next six numbers), the expense category (the following two numbers), and the Department/Cost (last two numbers). All the segments together make a complete account number. When you enter a **Value** for a particular segment, the **Description** column is locked with the description of that value entered in ***General Ledger***.
7. When you leave the Interfund Entries page, the new interfund entry is automatically saved.

Editing an interfund entry

You can change an interfund entry. For example, you may want to change the transfer account used between two ***General Ledger*** funds.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Interfund Entries** link. The Interfund Entries page appears.

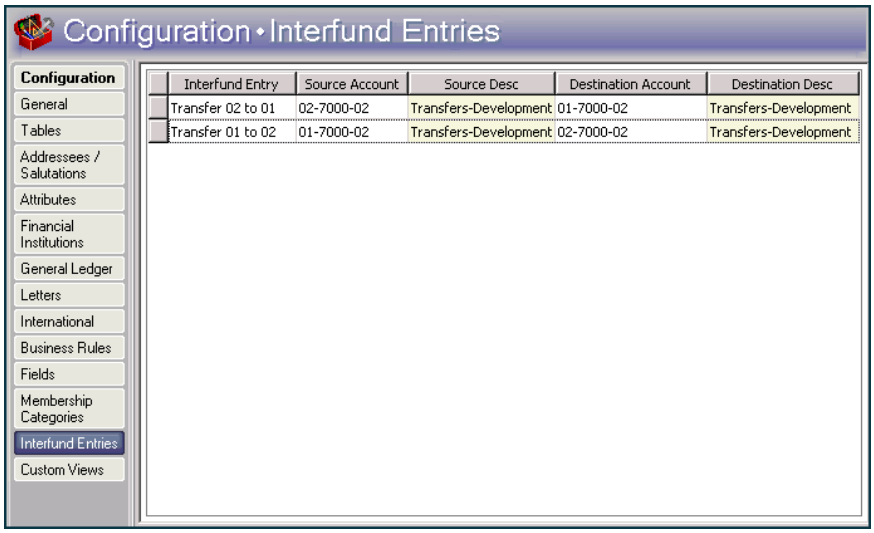


3. Select the entry you want to change.
4. Enter a new **Source Account** or **Destination Account** number.
5. When you leave the Interfund Entries page, your changes are automatically saved.

Deleting an interfund entry

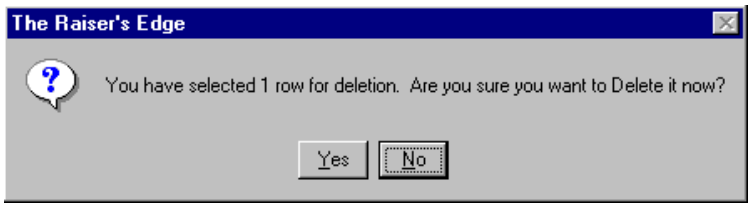
You cannot delete an interfund entry if it is currently in use. Deleting the information from ***The Raiser's Edge*** does not affect the information in ***General Ledger***.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click the **Interfund Entries** link. The Interfund Entries page appears.



3. In the grid, click the box on the far left of the entry you want to delete. The entire row highlights.

4. Press **DELETE** on your keyboard. A verification message appears.



5. To delete the interfund entry, click **Yes**. You return to the Interfund Entries page. The selected entry no longer appears in the grid.

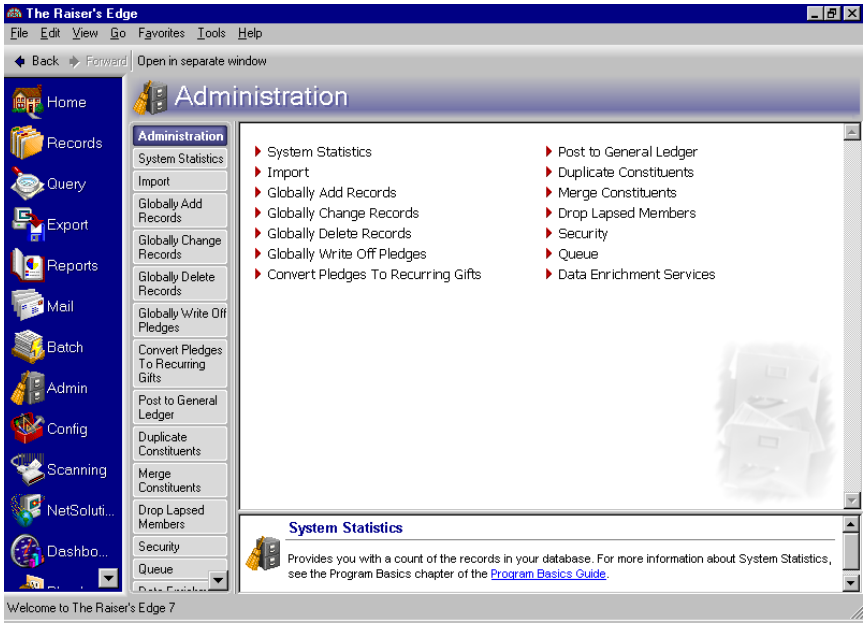
Posting Gifts to Blackbaud's General Ledger

The **Post to General Ledger** link in *Administration* allows you to post gifts entered in ***The Raiser's Edge*** to Blackbaud's fund accounting software in a few simple steps. Once you run the automatic posting option, the status of all gifts involved in the process automatically changes to "Posted" on the Miscellaneous tab of the gift record.

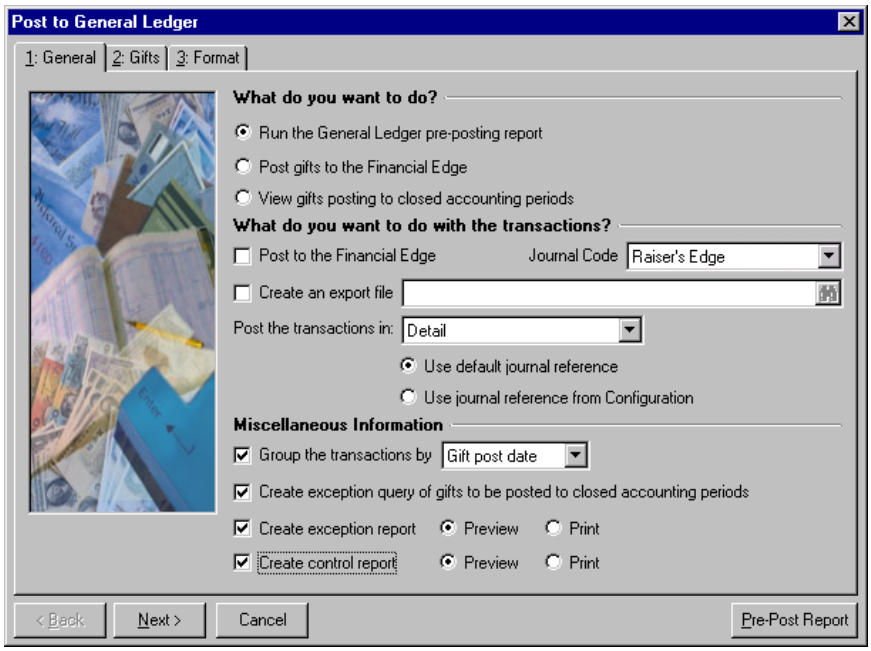
- **Running the pre-posting report**

  We recommend you print a pre-posting report and perform a backup of your database before posting gifts. The Post gifts to the Financial Edge option automatically marks gifts as "Posted". You cannot edit posted gifts. To changed a posted gift, you must run an adjustment. For more information about adjustments, see "Adjusting a Gift" on page 91.

  1. On the Raiser's Edge bar, click **Admin**. The Administration screen appears.



2. Select **Post to General Ledger**. The Post to General Ledger page appears, displaying the General tab.



3. In the **What do you want to do?** frame, you can mark **Run the General Ledger pre-posting report** to review a report of all gifts eligible for posting. Running the report does not change the post status of the gifts.
4. In the **What do you want to do with the transactions?** frame, you can mark the following checkboxes.
   - **Post to the Financial Edge** — If you mark this checkbox, the program validates all gifts that will be posted to ***The Financial Edge*** in the batch.

     In the **Source Code** field, click the down arrow to access a list of source codes available in ***General Ledger***. For easier reconciliation, we recommend you select a unique source code for ***The Raiser's Edge***. For information about defining a source code, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.
   - **Create an export file** — If you mark this checkbox, click the binoculars to enter the file name and path for the export.

     The export file is not used by ***The Raiser's Edge*** in the pre-posting process. You can use the export file for other reasons your organization may need or you can delete it.
   - **Post the transactions in** - You can select a Detail, Summary, or Summary(Cash/AR Only) transaction posting.

     Detail. If you select "Detail", the program creates a separate ***General Ledger*** transaction record for each gift posted. You must then select a journal reference: mark **Use default journal reference** to use last name and gift type; mark **Use journal reference from Configuration** to use the journal reference defined on the General Ledger page in *Configuration* in ***The Raiser's Edge***.

     Summary. If you select "Summary", select how to summarize the gifts in the **Summarize by** field:

     Gift Post Date — This creates a summary group based on the date specified in the **Post Date** field on the gift record.

     GL Fiscal Period — This creates a summary group based on the GL fiscal period the gift post date is in.

     Month — This summarizes gifts for each month.

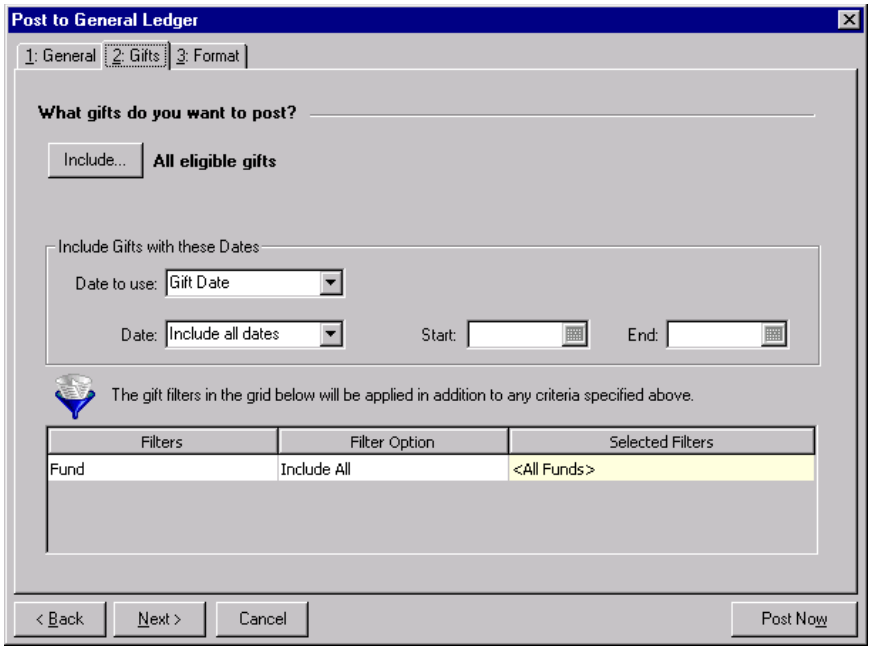
Note: Quarters are assumed based on the end of the fiscal year. You define fiscal years in *Configuration* in ***General Ledger***.

Quarter — This summarizes gifts for each quarter.

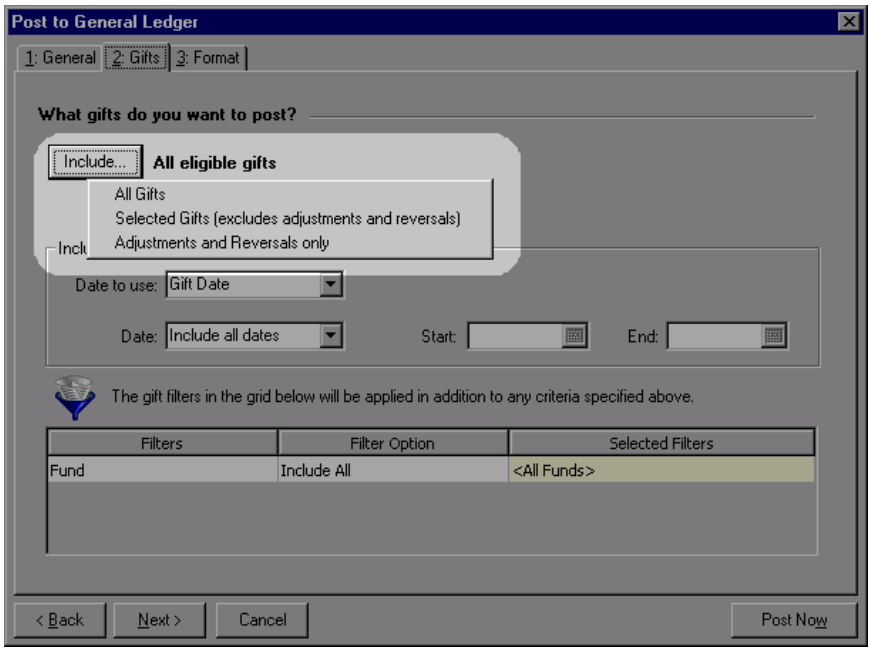
Summary(Cash/AR Only). If you select "Summary(Cash/AR Only)", credits are posted in detail with a separate transaction record for each gift, but debits are summarized by gift date. This makes the reconciliation between the deposits on your bank statement and the ***General Ledger*** cash account much easier. You must then select a journal reference: mark **Use default journal reference** to use last name and gift type; mark **Use journal reference from Configuration** to use the journal reference you defined in the **General Ledger** link in *Configuration*.

For more information about selecting a Detail or Summary post transaction file, see "Selecting a Post Transaction File" on page 132.

5. In the **Miscellaneous Information** frame, you can mark the following checkboxes:
   - **Group transactions by** - You can select to group your transactions by Batch or Gift post date.
   - **Create exception query of gifts to be posted to closed accounting periods** - The program creates a query of the gifts posted to closed accounting periods in ***General Ledger***. This option is enabled only if you selected the **Validate GL information** in *Configuration*.
   - **Create exception report** - This generates a report of all transactions posted to closed accounting periods in ***General Ledger***. The report displays Post Date, Account Number, Account Description, Project Description, and Reference. You can select to **Preview** the report on screen or **Print** out a hardcopy.
   - **Create control report** - This generates a report displaying Post Date, Description, Created By, No. of Trans., Total Debits, Total Credits, and Status of all gift records posted to ***General Ledger***. You can select to **Preview** the report on your computer screen or **Print** the report.
6. To filter the gift records you want to include in your report, click **Next** or select the Gifts tab.



7. Click **Include** to select the gift records for the report.



All Gifts — select this option to include all eligible gifts.

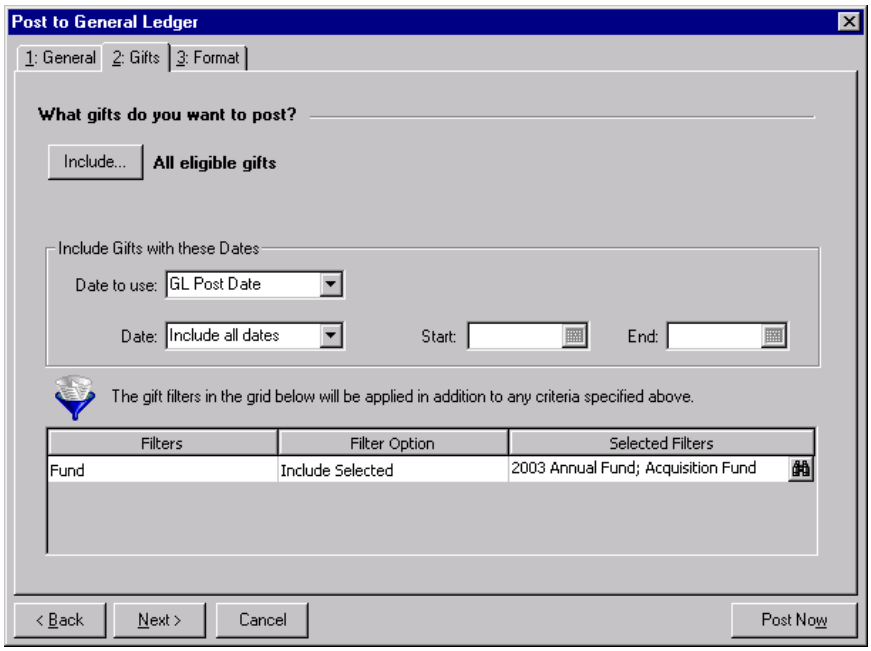
Selected Gifts (excludes adjustments and reversals) — select this option to include all gift records meeting the criteria you select in *Query* (with the exception of adjustments and reversals). For more information about query, see *Query & Export Guide*.

Adjustments and Reversals Only — select this option to include adjustments and reversals only.

8. In the **Date to use** field, select “Gift Date” or “GL Post Date”.
9. In the **Date** field, select the date range for the gifts you want to include for the report.

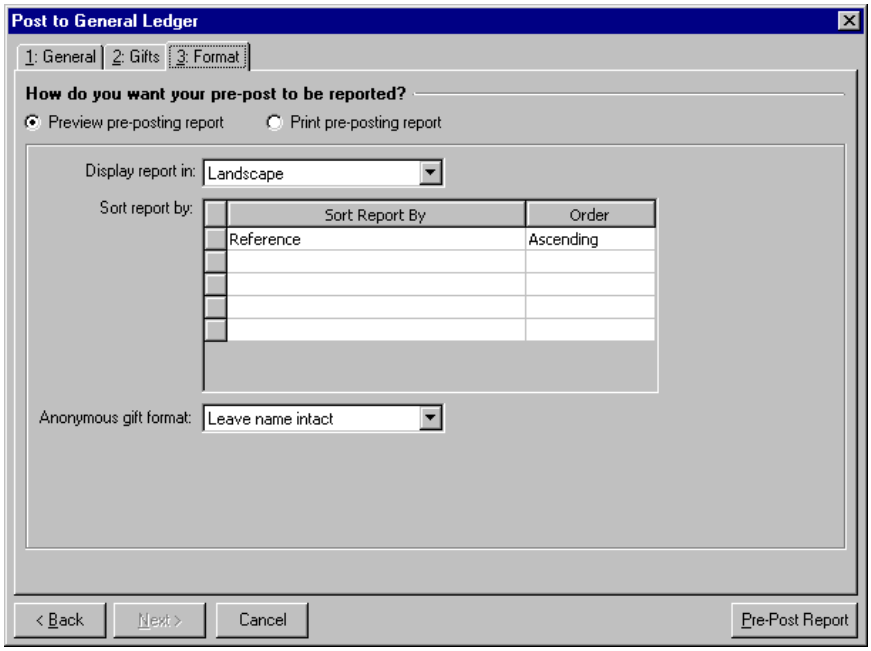
   If you select “<Specific range>”, **Start** and **End** fields appear. This way, you can enter exact dates you want.
10. In the **Filter Option** column of the funds filter grid, choose “Include All” or “Include Selected”.

If you choose “Include Selected”, enter the funds to include in the **Selected Filters** column.



Note: Click **Back** to return to the General tab.

11. Click **Next** or select the Format tab.

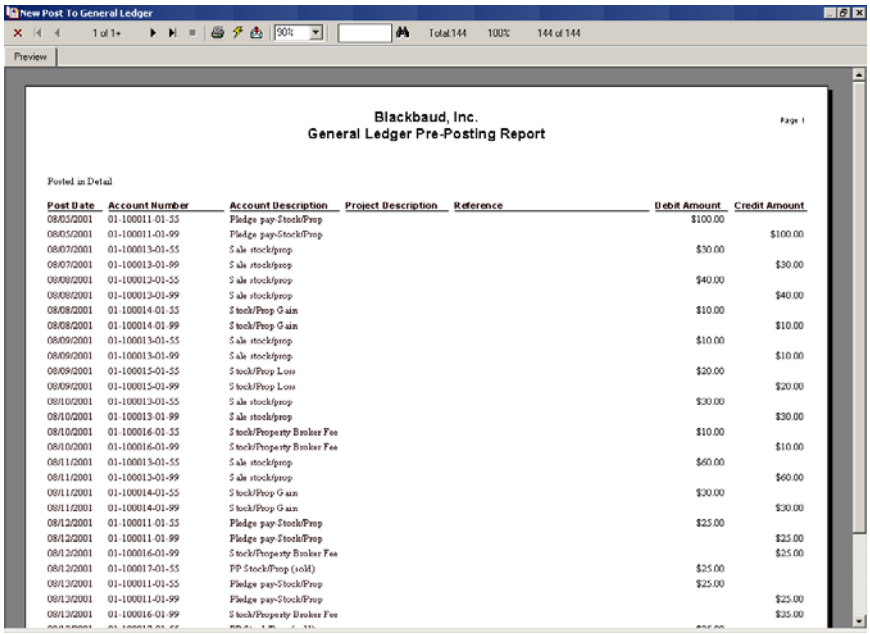


12. In the **How do you want your pre-post to be reported?** frame, select to preview the pre-posting first on the screen or print it.
13. If you are only running the pre-posting report, you can make report display selections. In the **Display report in** field, select “Portrait” or “Landscape”. In the **Sort report by** grid, select the fields to use to sort the report in the **Sort Report By** column:
    - Post date

- Account number
- Account description
- Project description
- Reference
- Amount

For each field, select “Ascending or “Descending” in the **Order** column.

14. If you selected “Detail” in the **Post the transactions in** field on the General tab, in the **Anonymous gift format** field, select how anonymous gifts should appear on the report. Select “Leave name intact”, “Use ‘Anonymous’”, or “Asterisk at end of line”.
15. To run the pre-posting report, click **Pre-Post Report**.
16. If you marked **Create exception query of gifts to be posted to closed accounting periods** on the General tab, the Save Static Query screen appears for you to enter a name for the query.
17. When the report processing is complete, the pre-posting report appears or prints, displaying post dates, account numbers, account descriptions, project descriptions, references, and debit and credit amounts.



Post Date	Account Number	Account Description	Project Description	Reference	Debit Amount	Credit Amount
08/05/2001	01-100011-01-55	Pledge pay-Stock/Prop			$100.00	
08/05/2001	01-100011-01-99	Pledge pay-Stock/Prop				$100.00
08/07/2001	01-100013-01-55	Sale stock/prop			$30.00	
08/07/2001	01-100013-01-99	Sale stock/prop				$30.00
08/08/2001	01-100013-01-55	Sale stock/prop			$40.00	
08/08/2001	01-100013-01-99	Sale stock/prop				$40.00
08/08/2001	01-100014-01-55	Stock/Prop Gain			$10.00	
08/08/2001	01-100014-01-99	Stock/Prop Gain				$10.00
08/09/2001	01-100013-01-55	Sale stock/prop			$10.00	
08/09/2001	01-100013-01-99	Sale stock/prop				$10.00
08/09/2001	01-100015-01-55	Stock/Prop Loss			$20.00	
08/09/2001	01-100015-01-99	Stock/Prop Loss				$20.00
08/10/2001	01-100013-01-55	Sale stock/prop			$30.00	
08/10/2001	01-100013-01-99	Sale stock/prop				$30.00
08/10/2001	01-100016-01-55	Stock/Property Broker Fee			$10.00	
08/10/2001	01-100016-01-99	Stock/Property Broker Fee				$10.00
08/11/2001	01-100013-01-55	Sale stock/prop			$60.00	
08/11/2001	01-100013-01-99	Sale stock/prop				$60.00
08/11/2001	01-100014-01-55	Stock/Prop Gain			$30.00	
08/11/2001	01-100014-01-99	Stock/Prop Gain				$30.00
08/12/2001	01-100011-01-55	Pledge pay-Stock/Prop			$25.00	
08/12/2001	01-100011-01-99	Pledge pay-Stock/Prop				$25.00
08/12/2001	01-100016-01-99	Stock/Property Broker Fee				$25.00
08/12/2001	01-100017-01-55	PP Stock/Prop (sold)			$25.00	
08/13/2001	01-100011-01-55	Pledge pay-Stock/Prop			$25.00	
08/13/2001	01-100011-01-99	Pledge pay-Stock/Prop				$25.00
08/13/2001	01-100016-01-99	Stock/Property Broker Fee				$35.00

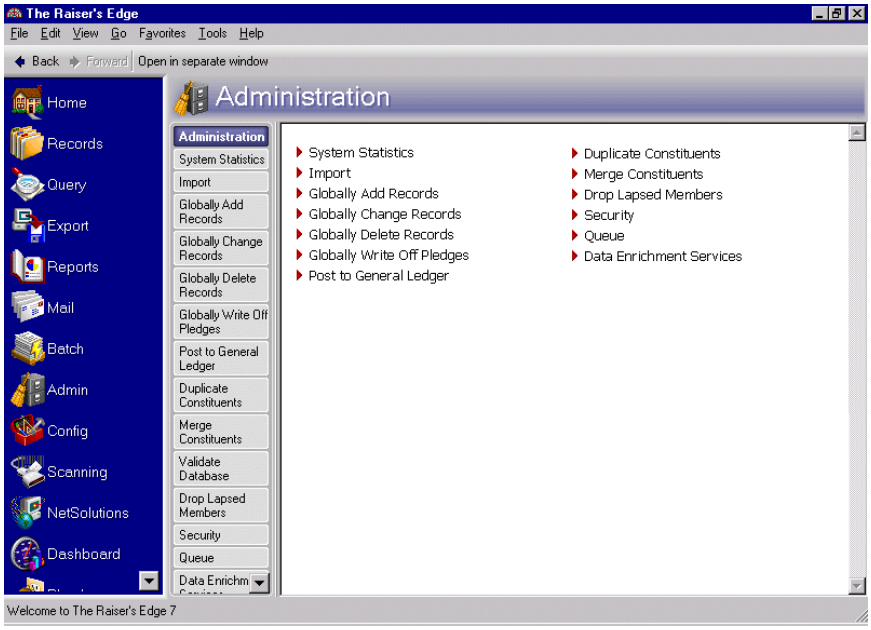
18. Review the report to verify the gifts that will be posted to ***General Ledger*** as a batch. Close the ***General Ledger*** pre-posting report.
19. If there are any exceptions during the posting process, and you marked **Create exception report** on the General tab, the ***General Ledger*** pre-posting exception report appears or prints, listing all gifts that will not post. Review and close the exception report.
20. If you marked **Create control report** on the General tab, the ***General Ledger*** pre-posting control report appears or prints, listing post dates, account numbers, who created the accounts, number of transactions, total debits, total credits, and status of the account. Review and close the pre-posting control report.

- **Posting gifts from The Raiser's Edge to The Financial Edge**

  If you have a network version of ***The Financial Edge***, the ***Financial Edge*** database must be running before you can post gifts.

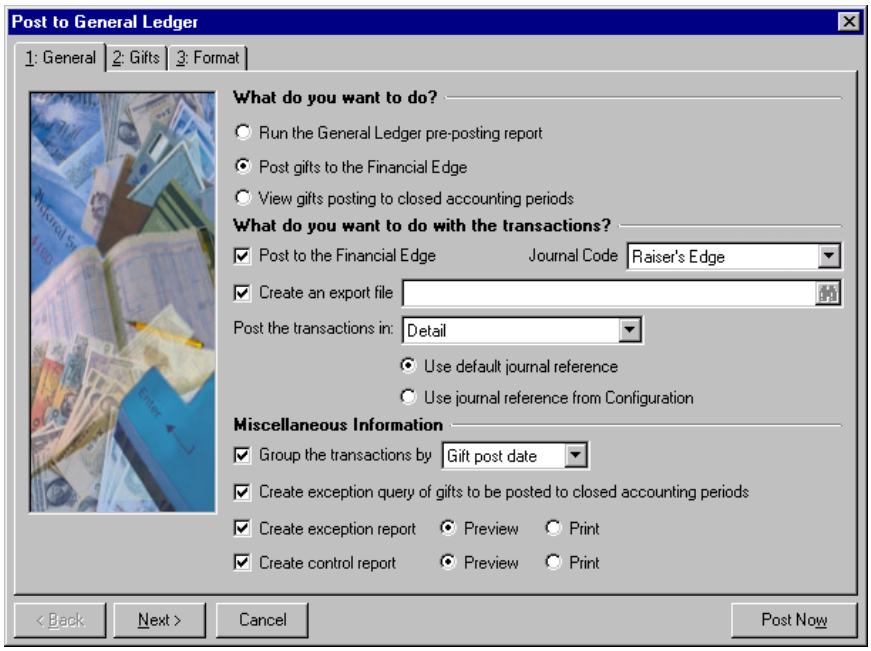
Warning: To post directly from ***The Raiser's Edge*** to the ***The Financial Edge***, ***The Financial Edge*** must be installed on the same workstation as ***The Raiser's Edge***, and you must have logged into ***The Financial Edge*** at least once.

1. On the navigation bar in ***The Raiser's Edge***, click **Admin**. The Administration screen appears.



Note: Even if you do not have Blackbaud's ***General Ledger***, you can use this procedure to learn how to post to your accounting software. The process is the same. It is important you remember where you posted the export file, so you can use the file to import to your accounting software.

2. Select **Post to General Ledger**. The Post to General Ledger screen appears.



We recommend you print a pre-posting report and perform a backup of the database before posting gifts. You cannot edit posted gifts. To change a posted gift, you must add an adjustment.

3. In the **What do you want to do?** frame, mark **Post gifts to the Financial Edge**. Only gifts with a current status of "Not Posted" in ***The Raiser's Edge*** are included. The posting process automatically changes the post status of the included gifts to "Posted".
4. In the **What do you want to do with the transactions?** frame, make posting and exporting selections for the transactions:
   - **Post to the Financial Edge —** Mark this checkbox for the program to post a batch to ***The Financial Edge***.

     In the **Source Code** field, click the down arrow to access a list of source codes available in ***General Ledger***. For easier reconciliation, we recommend you select a unique source code for ***The Raiser's Edge***. For information about defining a source code, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

Note: The export file is not needed to import the gift transactions into ***The Financial Edge***. The program automatically creates a journal batch in ***The Financial Edge***. You can use the export file as a backup for the journal batch. You can also use the export file for other reasons your organization may need or you can delete it.

   - **Create an export file** — This checkbox is marked automatically in case you need a backup for the journal batch in ***The Financial Edge***. Click the binoculars to enter the file name and path for the export
   - **Post the transactions in** — Select the format for the transaction posting. For information about the debit and credit rows that are created for each format, see "Selecting a Post Transaction File" on page 132.

     Detail. If you select "Detail", the program creates a separate ***General Ledger*** transaction record for each gift posted. You must then select a journal reference: mark **Use default journal reference** to use last name and gift type; mark **Use journal reference from Configuration** to use the journal reference defined on the General Ledger page in *Configuration* in ***The Raiser's Edge***.

     Summary. If you select "Summary", select how to summarize the gifts in the **Summarize by** field:

Gift Post Date — This creates a summary transaction based on the date specified in the **Post Date** field on the gift record.

GL Fiscal Period — This creates a summary transaction based on the GL fiscal period the gift post date is in.

Month — This summarizes gifts for each month.

Note: Quarters are assumed based on the end of the fiscal year. You define fiscal years in *Configuration* in ***General Ledger***.

Quarter — This summarizes gifts for each quarter.

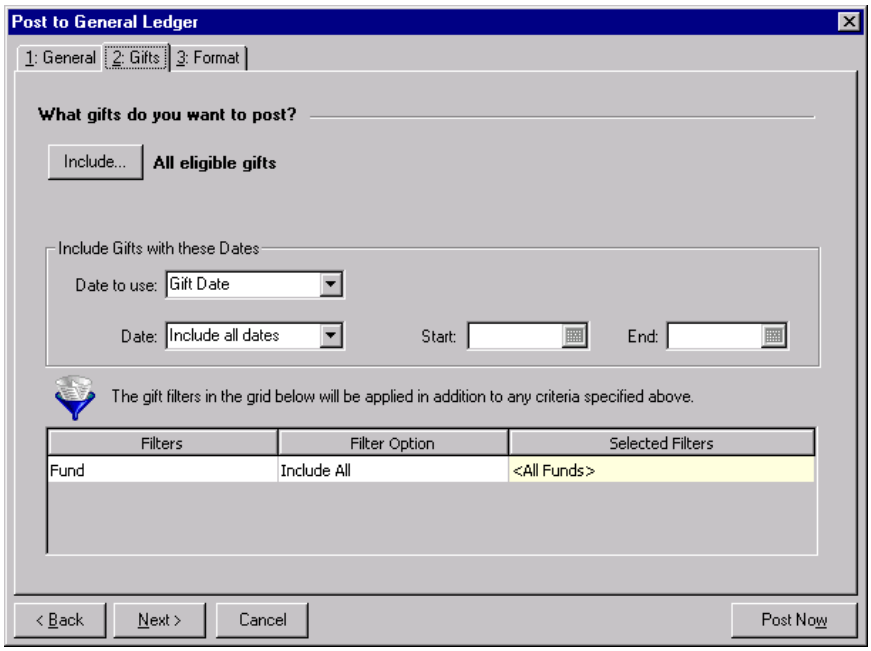
Specific date — This summarizes gifts for the date you enter in the **Date** field.

Summary(Cash/AR Only). If you select "Summary(Cash/AR Only)", credits are posted in detail with a separate transaction record for each gift, but debits are summarized by post date, batch number, and account number. This makes the reconciliation between the deposits on your bank statement and the ***General Ledger*** cash account much easier. You must then select a journal reference: mark **Use default journal reference** to use last name and gift type; mark **Use journal reference from Configuration** to use the journal reference you defined in the **General Ledger** link in *Configuration*.

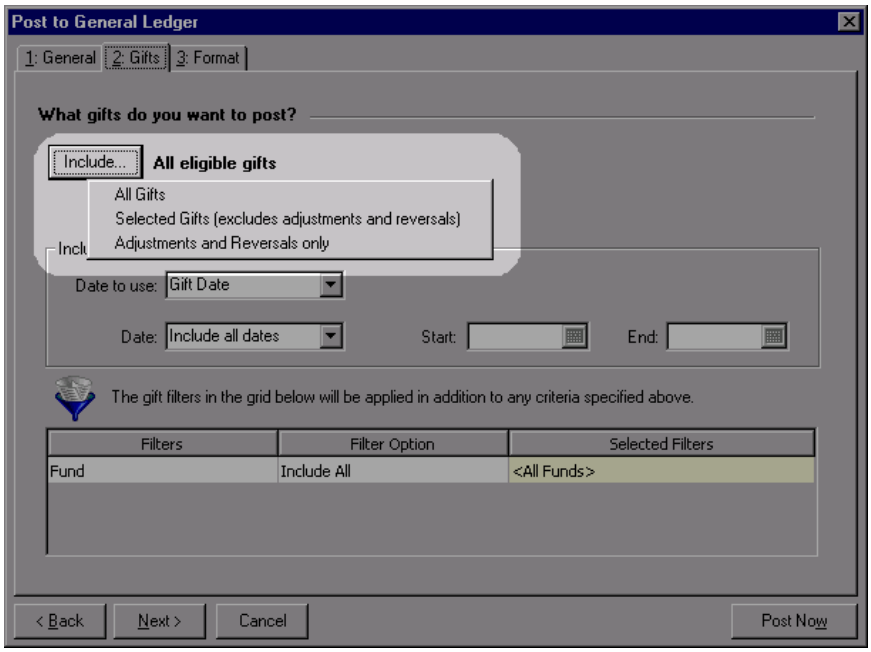
For more information about selecting a Detail or Summary post transaction file, see "Selecting a Post Transaction File" on page 132.

5. In the **Miscellaneous Information** frame, make grouping and reporting selections for the transactions:
   - **Group the transactions by** — Select to group the transactions by batch or gift post date.
   - **Create exception query of gifts to be posted to closed accounting periods** — The program creates a query of the gifts posted to closed accounting periods in ***General Ledger***. This checkbox is enabled only if you marked **Validate GL information** in *Configuration*.
   - **Create exception report** — This generates a report of all transactions posted to closed accounting periods in ***General Ledger***. The report displays Post Date, Account Number, Account Description, Project Description, and Reference. You can select to first preview the report on screen or print a hard copy.
   - **Create control report** — This generates a report displaying Post Date, Description, Created By, No. of Trans., Total Debits, Total Credits, and Status for all gift records posted to ***General Ledger***. You can select to first preview the report on screen or print a hard copy.

6. To filter the gift records you want to include in your posting, click **Next** or select the Gifts tab.



7. Click **Include** to select the gift records for posting.



All Gifts — select this option to include all eligible gifts.

Selected Gifts (excludes adjustments and reversals) — select this option to include all gift records meeting the criteria you select in *Query* (with the exception of adjustments and reversals). For more information about query, see *Query & Export Guide*.

Adjustments and Reversals Only — select this option to include adjustments and reversals only.

8. In the **Date to use** field, select “Gift Date” or “GL Post Date”. In the **Date** field, select the date range for the gifts you want to include for posting.

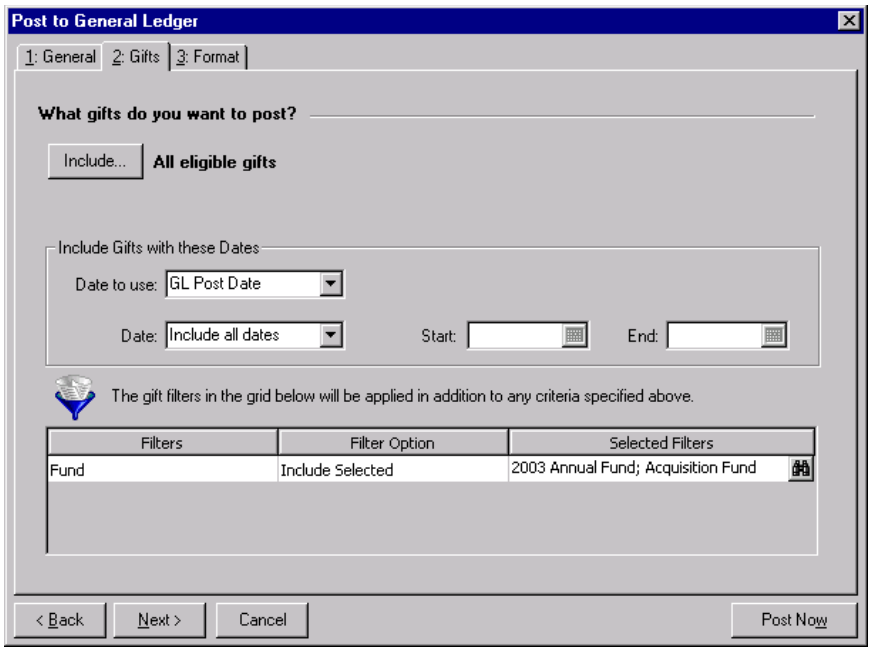
If you select “<Specific range>”, **Start** and **End** fields appear. This way, you can enter exact dates for your posting.

When posting, there are a number of important date details to remember.

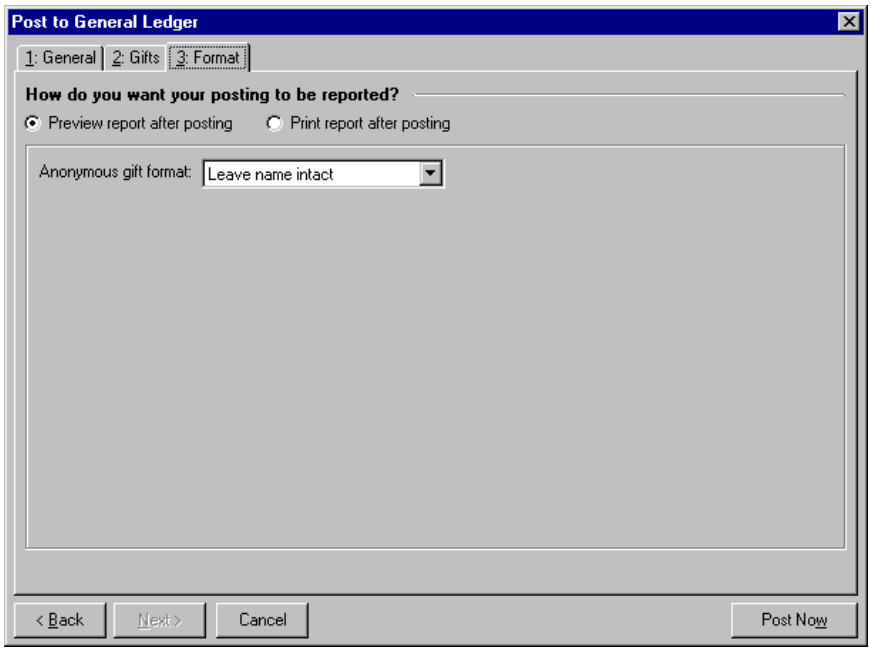
- If a write-off is within the date range you select, the Pledge posts regardless of the Pledge date. This is the same for an adjustment for a gift.
- If a Pledge date is within the date range you select, but a write-off for the Pledge is not, the write-off still posts. This is the same for an adjustment for a gift.
- If a gift is marked “Do Not Post” on the Miscellaneous tab on the gift record, any write-offs or adjustments for the gift do not post.
- If either the unsold or sold portion of a Stock gift are within the date range you select, both unsold and sold portions post.
- If you select to post by “Gift Date”, the sold portion of a Stock gift posts based on the **Date of sale** field date on the Sold Stock/Property Information screen on the gift record (not the date of the unsold portion).

9. In the **Filter Option** column of the funds filter grid, choose “Include All” or “Include Selected”.

   If you choose “Include Selected”, enter the funds to include in the **Selected Filters** column.



10. Click **Next** or select the Format tab.



11. In the **How do you want your posting to be reported?** frame, select to preview the posting first on the screen or print it.
12. If you selected "Detail" in the **Post the transactions in** field on the General tab, in the **Anonymous gift format** field, select how anonymous gifts should appear on the report. Select "Leave name intact", "Use 'Anonymous'", or "Asterisk at end of line".

Warning: Before you post gifts to ***The Financial Edge***, you should have a complete backup of your database in case you make a mistake. To successfully back up your data, you must first shut down the database.

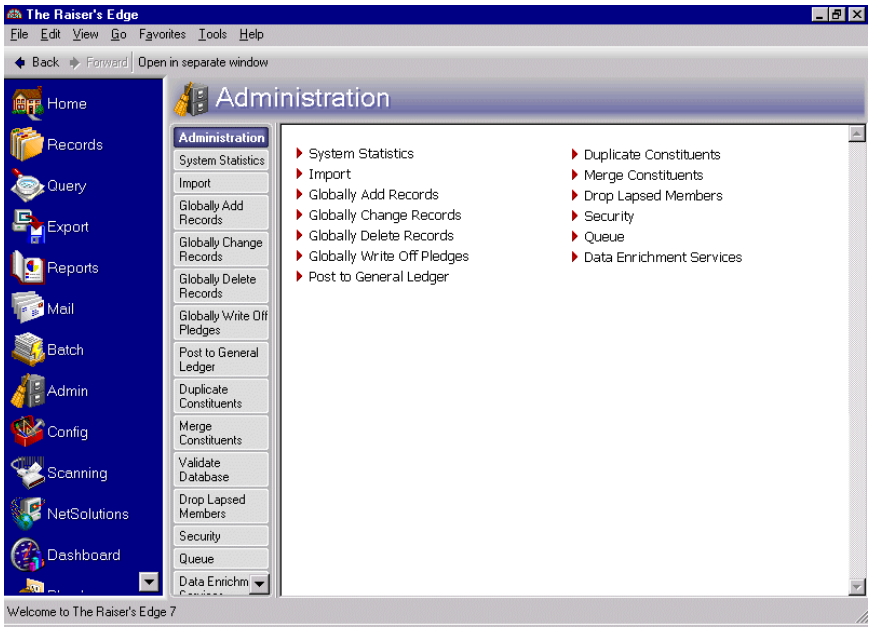
13. To post the gifts, click **Post Now**.
14. If you marked **Create exception query of gifts to be posted to closed accounting periods** on the General tab, the Save Static Query screen appears for you to enter a name for the query.
15. When the posting process is complete, the ***General Ledger*** post report appears or prints, listing post dates, account numbers, account descriptions, project descriptions, references, and debit and credit amounts. Review and close the ***General Ledger*** post report.
16. If there are any exceptions during the posting process, and you marked **Create exception report** on the General tab, the ***General Ledger*** exception report appears or prints, listing all accounts that did not post. Review and close the exception report.
17. If you marked the **Create control report** checkbox on the General tab, the ***General Ledger*** control report appears or prints, listing post dates, account numbers, who created the accounts, number of transactions, total debits, total credits, and status of the account. Review and close the control report.

Want to learn about "Running the pre-posting report" on page 119 or "Viewing gifts posting to closed accounting periods" on page 131

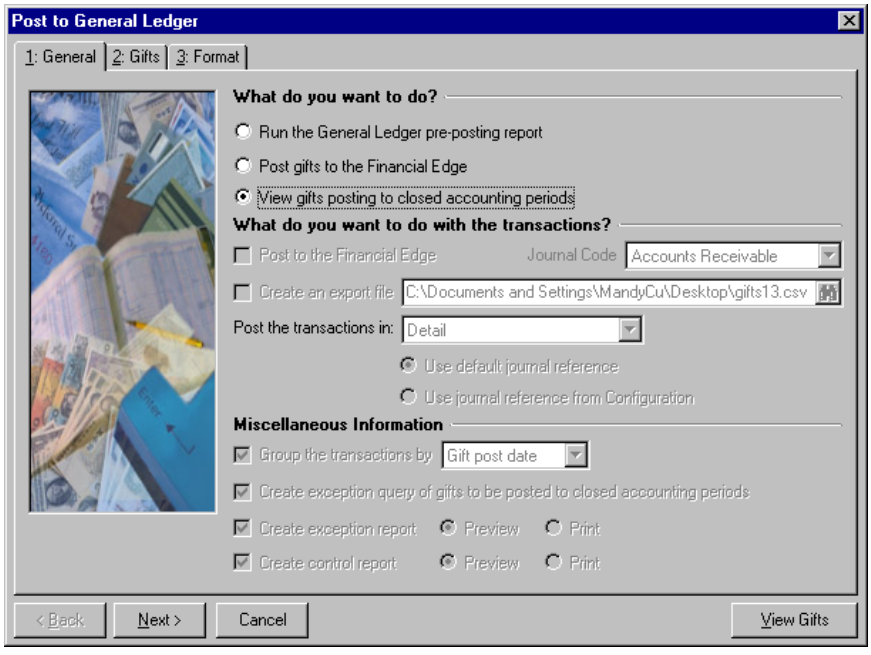
Viewing gifts posting to closed accounting periods

Before you post gifts to ***The Financial Edge***, you can view a list of gifts marked Not Posted with post dates in closed accounting periods. To post gifts successfully, you can change the post dates for open accounting periods on the Gifts to be Posted to Closed Accounting Periods screen.

1. On the navigation bar in ***The Raiser's Edge***, click **Admin**. The Administration screen appears.



2. Select **Post to General Ledger**. The Post to General Ledger screen appears.



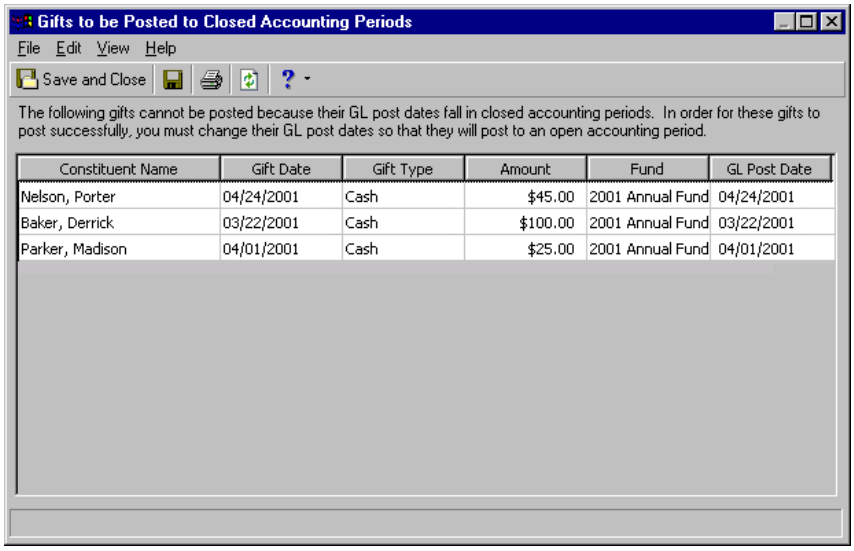
Note: If **Validate GL Information** is not marked on the General Ledger page in *Configuration*, the **View gifts posting to closed accounting periods** option is disabled. For more information, see "Establishing settings for the interface between The Raiser's Edge and General Ledger" on page 111.

3. In the **What do you want to do?** frame, mark **View gifts posting to closed accounting periods**.

The **What do you want to do with these transactions?** frame and the **Miscellaneous Information** frame become disabled. The **Post Now** button automatically changes to **View Gifts**.

The options on the Gifts and Format tab do not apply to the **View gifts posting to closed accounting periods** option.

4. To generate a list of gifts marked Not Posted with posted dates in closed accounting periods, click **View Gifts**. The Gifts to be Posted to Close Accounting Periods screen appears.



5. To post gifts successfully to open accounting periods in ***The Financial Edge***, edit the post date in the **GL post date** column.
6. Click **Refresh** on the toolbar. Any gift with a post date for an open accounting period no longer appears in the grid.
7. After you complete your changes, click **Save and Close** on the toolbar. You return to the General tab.

   To complete the posting process, see “Posting gifts from The Raiser’s Edge to The Financial Edge” on page 125.

Selecting a Post Transaction File

In the **Post the transactions in** field on the Post to General Ledger screen, you can select to post the transaction file in Detail, Summary, or Summary (Cash/AR Only).

Note: Even if you select “Detail” in the **Post the transactions in** field, the control account displays in summary form. By definition, a control account is a general ledger account that summarizes details from a subsidiary ledger.

If you select to post a Detail transaction file, a credit row and a debit row is created in the file. ***General Ledger*** uses data contained in the file to post the information. These tables contain the information within the Detail posting transaction file.

Credit Row

Field Name	Description
Account number	Credit account number as specified on the Fund.
Date	GL Post Date from the gift.

Transaction Type	'R' for 'Regular'
Debit/Credit	'C' for Credit
Amount	Amount of the gift credited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.
Reference	Either the GL Reference defined in *Configuration* or the default reference "Last Name/Org Name—Gift type" based on the selection on the Post to General Ledger screen. If the gift is a deleted posted gift, the reference will be "Last Name/Org Name—Gift type—DEL".
Blank field	Project as specified on the Fund. If blank, no Project is specified.

Debit Row

Field Name	Description
Account number	Debit account number as specified on the Fund.
Date	GL Post Date from the gift.
Transaction Type	'R' for 'Regular'
Debit/Credit	'D' for Debit
Amount	Amount of the gift debited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.
Reference	Either the GL Reference defined in *Configuration* or the default reference "Last Name/Org Name—Gift type" based on the selection on the Post to General Ledger screen. If the gift is a deleted posted gift, the reference will be "Last Name/Org Name—Gift type—DEL".
Blank field	Project as specified on the Fund. If blank, no Project is specified.

If you select to post a Summary transaction file, a credit row and a debit row is created for each period based on your breakdown selection in the **Summarized by** field on the Post to General Ledger screen. For example, if you select Month, a credit and debit row adds to the file for each month.

The breakdown options are Gift Post Date, GL Fiscal Period, Month, Quarter, or Specific date. ***General Ledger*** uses data contained in the file to post the information. These tables contain the information within the Summary posting transaction file.

Credit Row

Field Name	Description
Account number	Credit account number as specified on the Fund.
Date	Based on the option you select in the **Summarized by** field: Gift Post Date - Gift Post Date GL Fiscal Period - Last day of the year Month - Last day of the month Quarter - Last day of the quarter (For example, 03/31/YYYY or 09/30/YYYY) Specific date - Gift Post Date
Transaction Type	'R' for 'Regular'
Debit/Credit	'C' for Credit
Amount	Summarizes the amount of the gift credited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.
Reference	"Fund Description—Gift Type" or "Fund Description—GL Reversal" (for deleted posted gifts)
Blank field	Project as specified on the Fund. If blank, no Project is specified.

Debit Row

Field Name	Description
Account number	Credit account number as specified on the Fund.

Date	Based on the option you select in the **Summarized by** field: Gift Post Date - Gift Post Date GL Fiscal Period - Last day of the year Month - Last day of the month Quarter - Last day of the quarter (For example, 03/31/YYYY or 09/30/YYYY) Specific date - Gift Post Date
Transaction Type	'R' for 'Regular'
Debit/Credit	'D' for Debit
Amount	Summarizes the amount of the gift debited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.
Reference	"Fund Description—Gift Type" or "Fund Description—GL Reversal" (for deleted posted gifts)
Blank field	Project as specified on the Fund. If blank, no Project is specified.

If you select "Summary(Cash/AR Only)", the program creates a ***General Ledger*** batch that summarizes the debit side by ***Raiser's Edge*** batch ID (Cash or Accounts/Pledges Receivable). This selection also processes credit details (Revenues). This makes the reconciliation between the deposits on your bank statement and the ***General Ledger*** cash account much easier. You must then select a journal reference: select **Use default journal reference** to use key name and gift type; select **Use journal reference from Configuration** to use the journal reference you defined in the **General Ledger** link in *Configuration*.

Credit Row

Field Name	Description
Account number	Credit account number as specified on the Fund.
Date	GL Post Date from the gift.
Transaction Type	'R' for 'Regular'
Debit/Credit	'C' for Credit
Amount	Amount of the gift credited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.

Reference	Either the GL Reference defined in *Configuration* or the default reference "Last Name/Org Name—Gift type" based on the selection on the Post to General Ledger screen. If the gift is a deleted posted gift, the reference will be "Last Name/Org Name—Gift type—DEL".
Blank field	Project as specified on the Fund. If blank, no Project is specified.

Debit Row

Field Name	Description
Account number	Credit account number as specified on the Fund.
Date	Based on the option you select in the **Summarized by** field: Gift Post Date - Gift Post Date GL Fiscal Period - Last day of the year Month - Last day of the month Quarter - Last day of the quarter (For example, 03/31/YYYY or 09/30/YYYY) Specific date - Gift Post Date
Transaction Type	'R' for 'Regular'
Debit/Credit	'D' for Debit
Amount	Summarizes the amount of the gift debited to the GL account number. If the amount is an even dollar amount, decimals do not display. For example, $450.00 displays as '450'. However, $450.56 displays as '450.56' in the file.
Journal	Displays the GL journal code you select in the **Journal Code** field on the Post to General Ledger General tab.
Reference	"Fund Description—Gift Type" or "Fund Description—GL Reversal" (for deleted posted gifts)
Blank field	Project as specified on the Fund. If blank, no Project is specified.

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A pledge is a promise to make a gift in the future. For example, a constituent may agree to donate a $50 gift next month. Because you have not yet received the gift, the constituent's gift is a pledge. When constituents make a pledge to your organization, they are implicitly stating support for your causes and goals.

When you receive a pledge, you need to add the pledge to your ***Raiser's Edge*** database by creating a pledge gift record. Pledge gift records, like all gift records, contain essential information about the gift. Each pledge gift record is represented by a series of tabs similar to those in a file folder. Because pledge data is centrally located, you can quickly access the information you need.

This chapter explains how to add a new pledge to the database, apply payments toward an existing pledge, adjust a pledge, and write off a pledge. Many of the concepts used in this chapter are explained in the Gift Record chapter. We recommend you read the Gift Record chapter before continuing in the Pledges chapter. For more information, see "Gift Record Basics" on page 1.

Frequently Used Terms

This section defines words and phrases you need to know as you work with pledges. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Adjusting a pledge. When you adjust a pledge, you create an adjustment record to track any changes made to the gift amount and funds to which the gift is designated. Adjustment records are posted to the ***General Ledger*** so you can maintain a record of any changes in the gift amount or the distribution of incoming funds. If an adjustment has not been posted to the ***General Ledger***, it is referred to as "Pending." Only one pending adjustment can exist for each gift record. After posting a pending adjustment to the ***General Ledger***, you can make another adjustment to the gift record.

Master pledge. A master pledge is a gift record containing the gift amount a constituent agrees to donate and the installment schedule for the pledge payments. You create a master pledge by selecting Pledge in the **Gift type** field on a gift record. For example, Susan McDonald pledges to donate $100 to your organization. She wants to pay this pledge in two installments due on June 1 and July 1. To record Susan's gift in your database, you need to create a new gift record with a gift type of Pledge. On the Installments/Payments tab of this gift record, you can enter the installment schedule Susan plans to use to pay her pledge.

Pledge. A pledge is a promise to make a gift in the future and can be paid in single or multiple installments. After a constituent makes a pledge to your organization, you need to create a gift record with the gift type of Pledge. When you receive a payment for a pledge, you create a new gift record and apply it toward the pledge to reduce the balance. Every gift type except Pledge, Recurring Gift, and Planned Gift can be applied to a pledge to reduce the balance. When a constituent does not pay the amount owed for a pledge, you can write off the pledge so it does not appear as expected income.

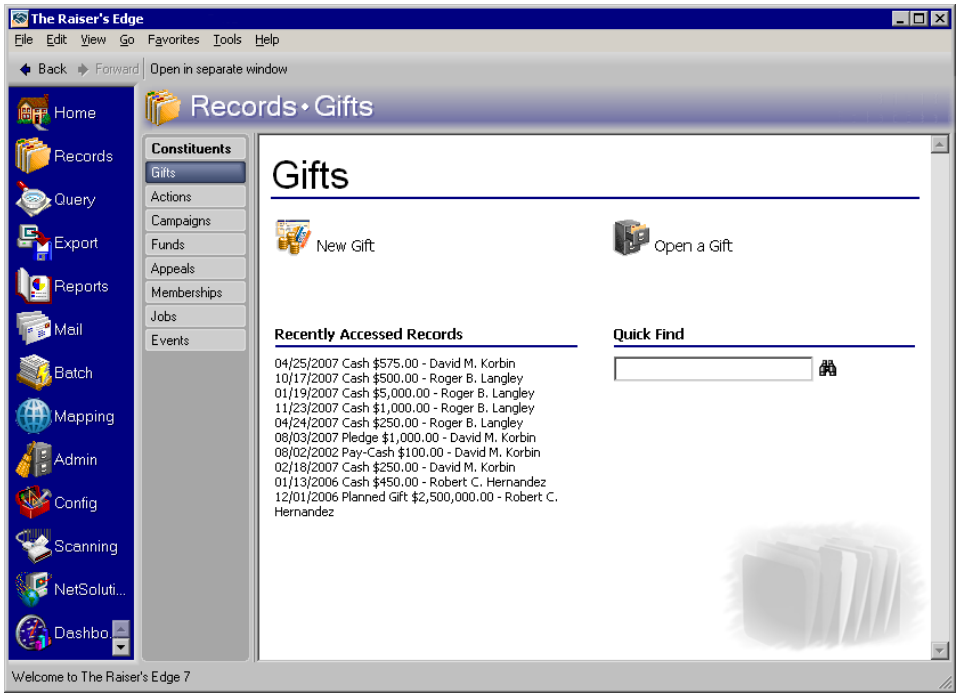
Pledge Installment. An installment is a scheduled payment that reduces the balance of a master pledge. For example, Susan McDonald pledges $100 to your organization. She plans to pay this pledge in two installments due on June 1 and July 1. When you add Susan's pledge, you set up a payment schedule on the Installments/Payments tab. Installments can be paid on a weekly, biweekly, semi-monthly, monthly, bimonthly, quarterly, semi-annual, or annual schedule. Installments can also be paid in one payment or on an irregular schedule.

Pledge overpayment. Occasionally, a constituent may overpay a pledge, which means he sends in more than the total of the pledge. When this happens, you can either create a cash gift for the difference or increase the amount of the original pledge. If you create a cash gift, you are adding a new gift for the constituent. When you increase the amount of the original pledge, you are changing the original pledge gift record.

Pledge write-off. When a constituent defaults or cannot make payments on a pledge, you can write off the pledge so the balance no longer appears as expected income. For example, a constituent pledges $500 to your organization. He calls you six months later to inform you he is no longer employed, and cannot make any payments on this pledge in the future. You can write off the $500 pledge so that the gift record does not have a pledge balance. Once you write off a pledge, you can change or delete the write-off.

Navigating in Gifts

After you create a gift pledge, you can access the pledge from the Gifts page by following the same methods you used to access other gift records. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



From the Gifts page, you can also create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, and Other. To add a new matching gift pledge, create a gift record for the gift being matched, then select the Matching Gifts tab on this record to add a new matching gift.

The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing a Pledge Gift Record

Note: A gift type represents the kind of gift you receive. The gift types available in ***The Raiser's Edge*** are Cash, Pledge, Stock/Property, Gift-in-Kind, Other, and Recurring Gift. For more information about gift types, see "Understanding Gift Types" on page 24.

A pledge gift record is created when you add a gift record and select a gift type of Pledge. You can access gift records from the Gifts page of *Records* and from the Gifts tab of a constituent record. From the Gifts page of *Records*, you can add a new gift record, open an existing gift record, access recently opened gift records, and quickly search for an existing gift record. For more information about opening a gift record from the Records page, see “Accessing a Gift Record” on page 7. From the Gifts tab of a constituent record, you can add a new gift record, open and edit an existing gift record, and delete an existing gift record (if you have security rights). For more information about opening a gift record from the Gifts tab on a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

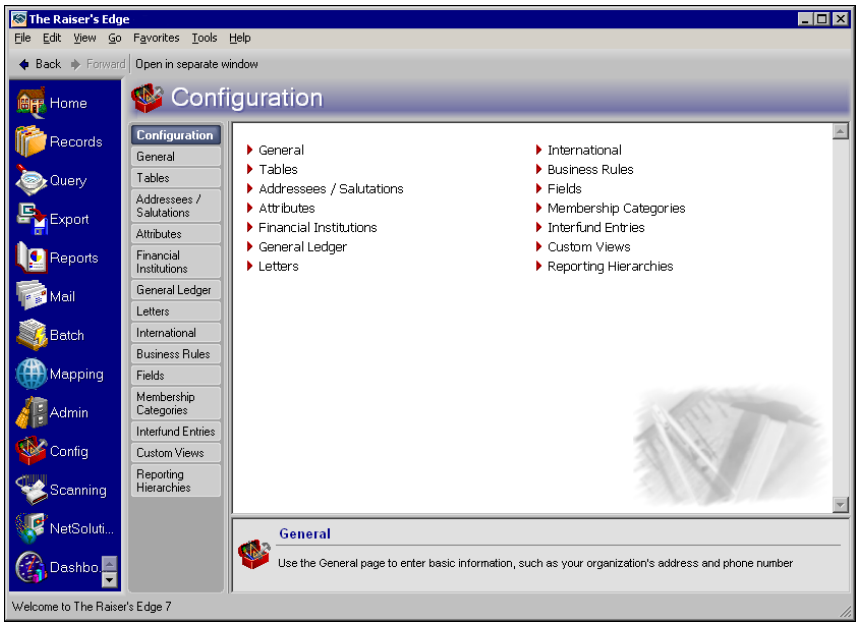
Pledge Business Rules

Business rules are preferences you can set that affect how ***The Raiser’s Edge*** works on all workstations. One business rule is specific to pledges. When adding gifts to your database, the program can warn you when a constituent has a pledge with an outstanding balance. For more information about all business rules available in ***The Raiser’s Edge***, see the Configuration chapter of the *Configuration & Security Guide*.

- **Defining the business rule for pledges**

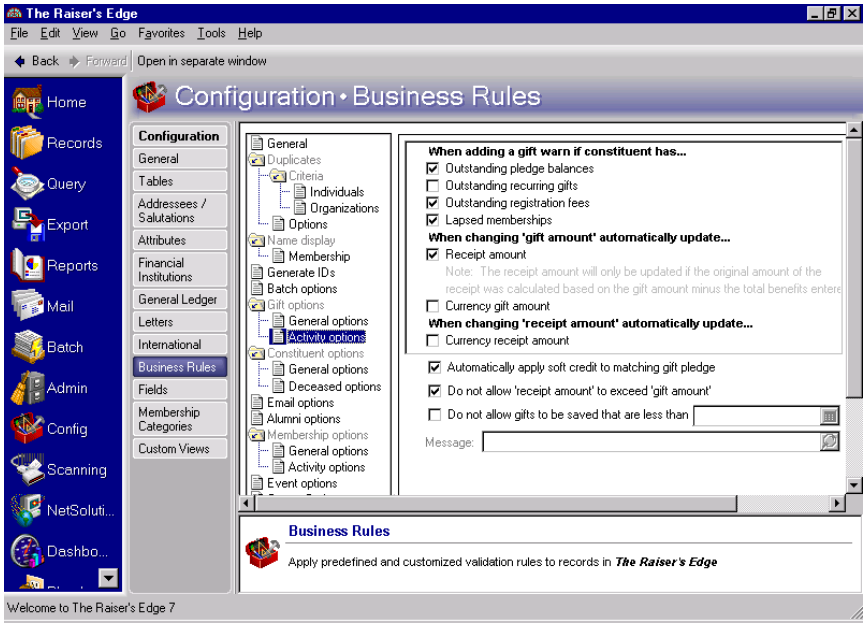
Warning: To define business rules, you must have security rights. If you do not have appropriate security rights, the **Business Rules** link is not available on the Configuration page. For more information, see the Security chapter and the Configuration chapter of the *Configuration & Security Guide*.

1. On the Raiser’s Edge bar, click **Config**. The Configuration page appears.



2. Click the **Business Rules** link. The Business Rules page appears.

3. From the tree view on the left, select **Activity options** in the **Gift options** folder. The Business Rules page now appears with the gift-related options.



4. Under **When adding a gift warn if constituent has** folder, mark the **Outstanding pledge balances** checkbox if you want to be reminded when you add a gift for a constituent that has an outstanding pledge.
5. When you make changes to business rules, your preferences are updated immediately.

Understanding Pledges

A pledge is a promise to make a donation to an organization. For example, as part of your Annual Campaign, you sent appeal cards to all constituents who made a previous donation to your organization. Joe Smith returned his appeal card and pledged to give $1,000 to your organization. To record Joe's pledge in your database as expected income, you need to create a new gift record and select Pledge in the **Gift type** field. This gift record is called a master pledge because it contains information such as the installment schedule and the remaining balance due for the pledge. When you set up a master pledge, you enter information including the gift amount; the campaign, fund, appeal, and package to which the gift should be attributed; the payment type; attributes; and soft credits.

Pledges can be paid in single or multiple installments. Joe Smith can choose to pay his $1,000 pledge in one payment or according to a set schedule. Regardless of whether a pledge has single or multiple installments, you need to create a new gift record for each pledge payment you receive. In the **Gift type** field on the gift record for the pledge payment, you need to select the gift type the constituent is using to pay the pledge. For example, if Joe sends a personal check to pay his pledge, you need to create a new gift record and select Cash in the **Gift type** field because a personal check is a form of cash.

Note: The program adds defaults to fields on the pledge payment gift record only when the fields are blank. For example, if you add a campaign on the pledge payment gift record before you apply the payment to a pledge, the program does not add a default from the pledge because the **Campaign** field on the pledge payment gift record is not blank.

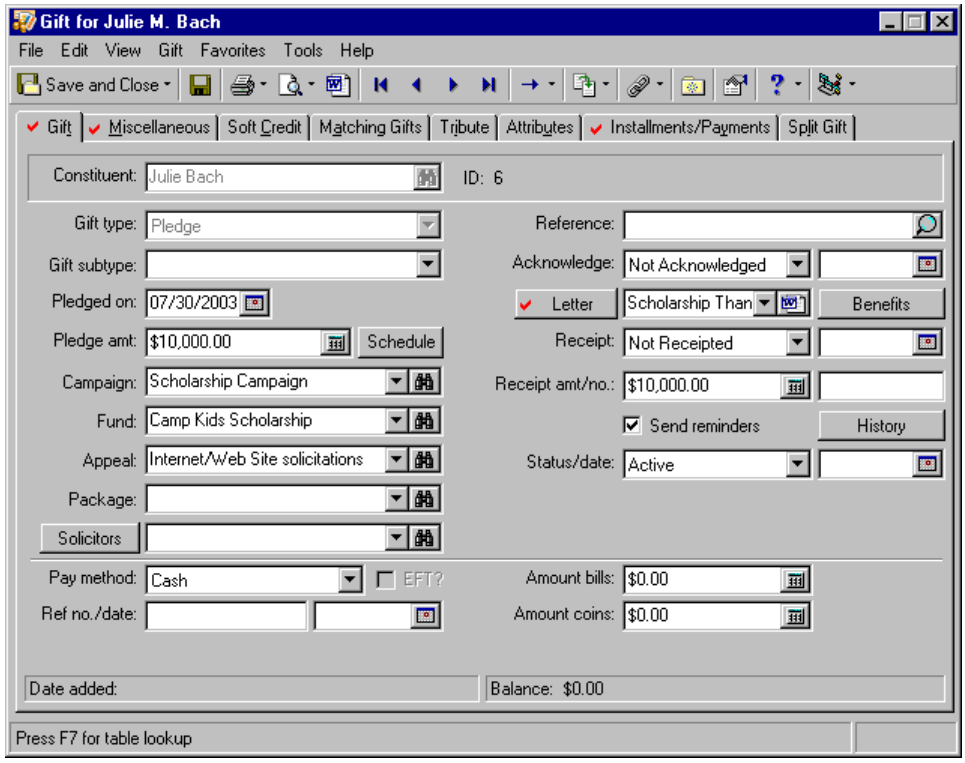
After you create a gift record for a pledge payment, you need to apply the pledge payment toward the master pledge to reduce the balance. When you apply a payment to a pledge, the program defaults the **Amount**, **Campaign**, **Fund**, **Appeal**, **Package**, **Solicitor**, **Letter**, and **Receipt** fields from the pledge gift record to the appropriate fields on the gift record for the pledge payment. You can change these defaults as necessary.

Tabs on a Pledge Gift Record

Differences between a pledge gift record and the basic gift record include minor changes to the Gift tab and the addition of an Installments/Payments tab. From the Installments/Payments tab, you can schedule the due dates for pledge installments and view payments made toward the pledge. The Miscellaneous, Soft Credit, Matching Gifts, Honor/Memorial, Attributes, and Split Gift tabs on the pledge gift record are similar to those on all gift records. For detailed information about these tabs, see “Understanding the Tabs on a Gift Record” on page 25.

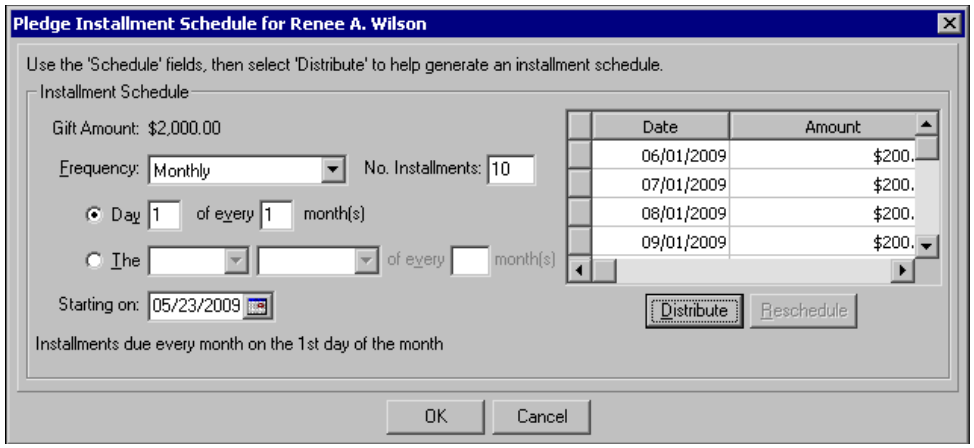
Gift Tab For Pledges

When you select Pledge in the **Gift type** field, additional features are enabled on the Gift tab of a pledge gift record. Additions to the standard Gift tab include the **Schedule** button, **Send reminders** checkbox, **History** button, and **Status/date** field.



Scheduling Pledge Installments

On a pledge gift record, the **Schedule** button appears on both the Gift tab and the Installments/Payments tab of a pledge gift record. When you click **Schedule**, the Pledge Installment Schedule screen appears.



The Pledge Installment Schedule screen walks you through the process of creating a payment schedule. You select the payment frequency, number of installments, the date payments are due, and when payments start. The grid displays the payment schedule according to the criteria you set up. Please note the starting on date is not necessarily the date of the first payment. The first payment date depends on the day you determine payments are due. For example, if you select 05/23/2009 as the starting on date and the payment due date as the first day of the month, the first payment is due on 06/01/2009. For more information about scheduling pledge installments, see “Scheduling Pledge Installments” on page 146.

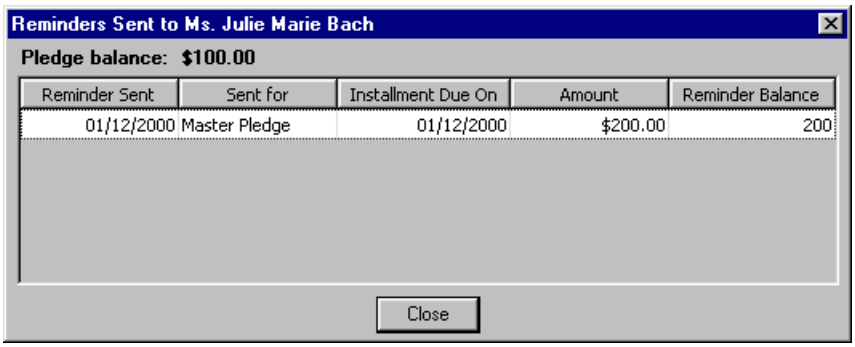
Sending Pledge Reminders

To increase the number of constituents who pay their pledges, you may want to send a letter or card to remind donors of pledges they have made. In *Mail*, you can use the Reminders mail task to print pledge reminders on several types of forms you can order from Blackbaud. If you do not want to use these forms, you can use the mail task to export data to the application where you created a custom form. For a donor to receive a pledge reminder using the Reminders mail task, you must mark the **Send reminders** checkbox on the gift record.

Note: If you are scheduling a new pledge, the Reminders Sent screen is blank because you have not sent any reminders to the constituent for this pledge.

When creating pledge reminders, you can choose to send either a single pledge reminder for the entire pledge or a reminder each time an installment is due. For more information about sending pledge reminders using *Mail*, see the Reminders chapter of the *Mail Guide*.

The **History** button appears beside the **Send reminders** checkbox. When you click the **History** button, the Reminders Sent screen appears so you can view all reminders sent to the constituent for this pledge.



Note: In *Mail*, your selection to run reminders **One per pledge** or **One per installment** affects the **Installment Due On** column on the Reminders Sent screen. If you select **One per pledge**, the **Installment Due On** column lists the pledge date as the due date. If you select **One per installment**, the **Installment Due On** column lists the installment date as the due date. In addition, the **Sent for** column is affected. If you select **One per pledge**, Master Pledge defaults into the column. If you select **One per installment**, Installment 1, Installment 2, and so forth defaults into the column.

If you choose to send reminders to a donor, the program tracks the information about each pledge reminder you send. This information includes the date you print the reminders in *Mail*, due date for the pledge or pledge installment, amount due, and remaining amount due on the pledge at the time you sent the reminder.

Understanding the Status/date Field

On a pledge gift record, the status indicates whether you can apply gifts to the pledge to reduce the balance and the date tracks the most recent status change. The **Status/date** field is available only if you have the optional module *Electronic Funds Transfer*. There are five statuses you can select:

Active. The pledge is active and gift records can be applied to the pledge to reduce the balance.

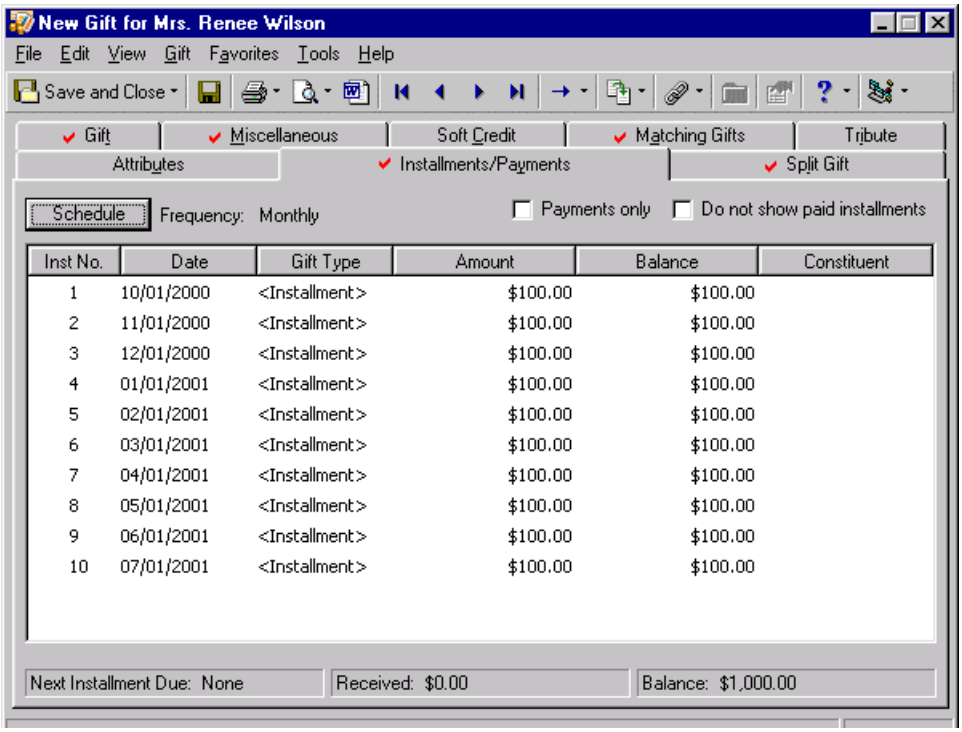
Held. The pledge is temporarily inactive and you cannot apply a gift record to the pledge to reduce the balance. You may want to change a pledge's status to "Held" if the donor calls to tell you he cannot make payments this month, but wants to resume donating to your organization next month.

Terminated. The pledge gift is closed and you cannot apply a gift record to the pledge to reduce the balance. A Terminated status can have a negative connotation. Typically, a record is terminated if the constituent chooses to stop paying the gift before paying the pledged amount. For example, if a constituent promises to donate a pledge gift every week for the next three years, then calls after a year to tell you he will no longer make donations to your organization, you can change the status for his pledge gift to Terminated. Once you select Terminated in the **Status** field and save the pledge gift record, you cannot apply gift records toward the pledge to reduce the balance ever again.

Completed. The pledge gift is closed and you cannot apply a gift record to the pledge to reduce the balance. A Completed status has a more positive connotation. For example, if a constituent promised to donate a pledge gift of $20 every week for a year, you can change the pledge's status to Completed when the constituent fulfills the donation and stops sending gifts. Once you select Completed in the **Status** field and save the pledge gift record, you cannot apply gift records toward the pledge to reduce the balance ever again.

Installments/Payments Tab

When you select Pledge in the **Gift type** field, the Installments/Payments tab appears so you can schedule pledge payments and view payments applied toward the pledge.



You can click the **Schedule** button to define the payment schedule for the pledge. After you define the payment schedule, the pledge installments and payments display in the grid. The grid displays information including the due date, amount due, and remaining balance for the installment.

Scheduling Pledge Installments

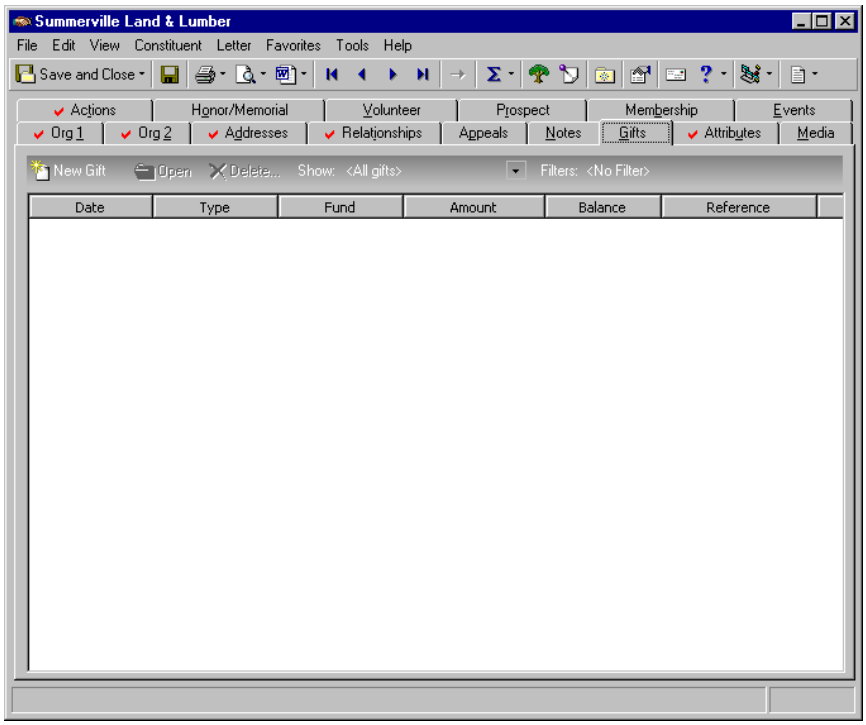
When you add a pledge to your database, you should establish a schedule for the payments. Pledge installments can be made on a single (one payment), weekly (once a week), biweekly (every two weeks), semi-monthly (twice a month), monthly (once a month), bimonthly (every two months), quarterly (four times a year), semi-annual (twice a year), or annual (once a year) schedule. Installments can also be paid on an irregular schedule, which means the payments do not fit into one of the regular schedules. For example, a constituent may request to make a payment every three weeks.

Scheduling a pledge

You can use this procedure to schedule a new pledge gift only if you have not yet saved the gift record. If you saved the gift record, you can reschedule the pledge. For more information, see “Rescheduling Pledges” on page 150.

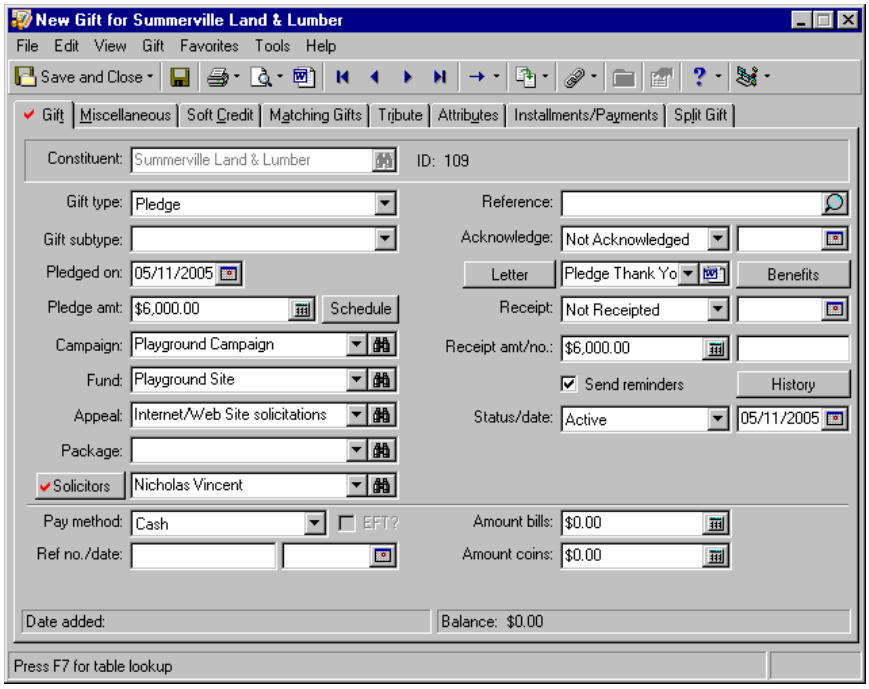
Scenario: Your organization’s New Playground Campaign is a big hit with your constituents. Mary Beth Richardson, a solicitor, visits the president of Summerville Land & Lumber and convinces her to pledge $6,000 to the campaign’s Building Fund. Summerville Land & Lumber plans to pay the pledge in six monthly installments of $1,000 each.

1. From Summerville Land & Lumber’s constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

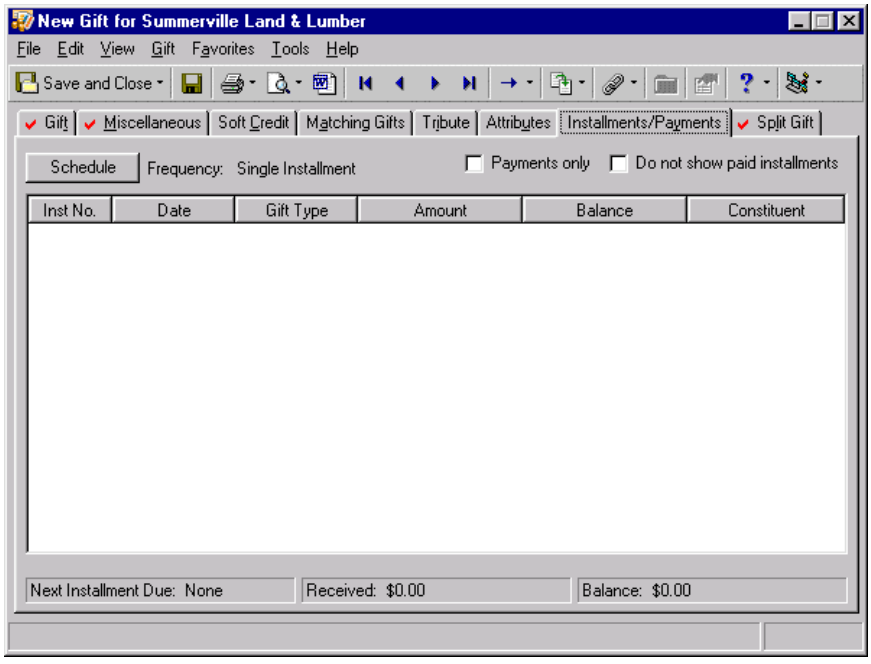


2. On the action bar, click **New Gift**.

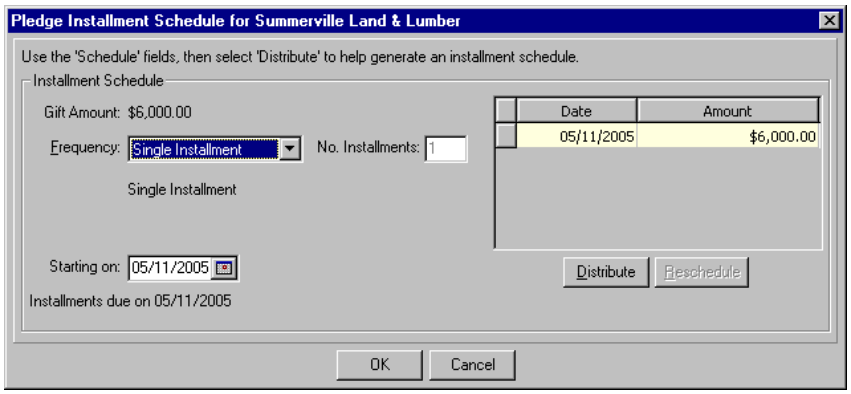
3. From the New Gift screen, select the Gift tab and add the information about Summerville Land & Lumber's gift as shown on the screen below. For more information about adding a gift record, see the Gift Records chapter. For more information about adding a gift record with the **Gift type** of Pledge, see "Adding a new pledge" on page 159.



4. Select the Installments/Payments tab.



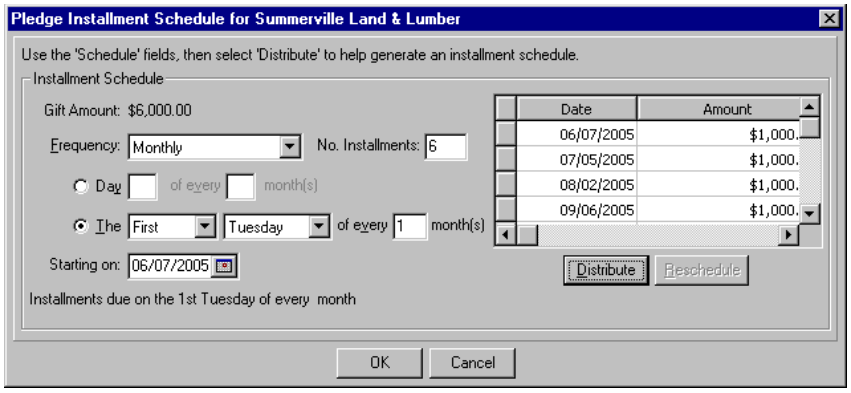
5. Click **Schedule**. The Pledge Installment Schedule screen appears.



6. In the **Frequency** field, select “Monthly”.
7. In the **No. Installments** box, enter “6”. Summerville Land & Lumber is paying the pledge in six installments.

8. Mark **The [ ] [ ] of every [ ] month(s)** option. Summerville Land & Lumber pledges to make $1,000 payments on the first Tuesday of every month for the next six months.
9. In the first field of **The [ ] [ ] of every [ ] month(s)** option, select “First”.
10. In the second field of **The [ ] [ ] of every [ ] month(s)** option, select “Tuesday”.
11. In the last field of **The [ ] [ ] of every [ ] month(s)** option, enter “1”. The option now reads **The First Tuesday of every 1 month(s)**.
12. In the **Starting on** field, enter the date 06/07/2005. Because you are scheduling the payment on the first Tuesday of every month, the first payment is due June 7, 2005.

13. To update the installment schedule in the grid, click **Distribute**. The installment schedule grid displays the date and amount of each pledge payment. Because Summerville Land & Lumber is paying the pledge in six installments, the grid displays six $1,000 payments beginning on June 6, 2005.



14. Click **OK**. You return to the pledge gift record.
15. To save the gift and close the record, click **Save and Close** on the toolbar.

Rescheduling Pledges

Occasionally, constituents make pledges and then realize they cannot pay installments according to the original payment schedule. Rather than write off the remaining pledge balance, you can adjust the installments so the donor is committed to another payment schedule with the intentions of fulfilling the entire pledge amount.

Note: If a pledge has already been posted, you must use the **Adjust** option to reschedule the pledge installments. For more information, see “Adjusting a Pledge” on page 175.

You can add, insert, delete, and edit unpaid installments. If a donor decides to change the frequency of pledge payments, you can redistribute the remaining balance of a pledge according to the new payment schedule.

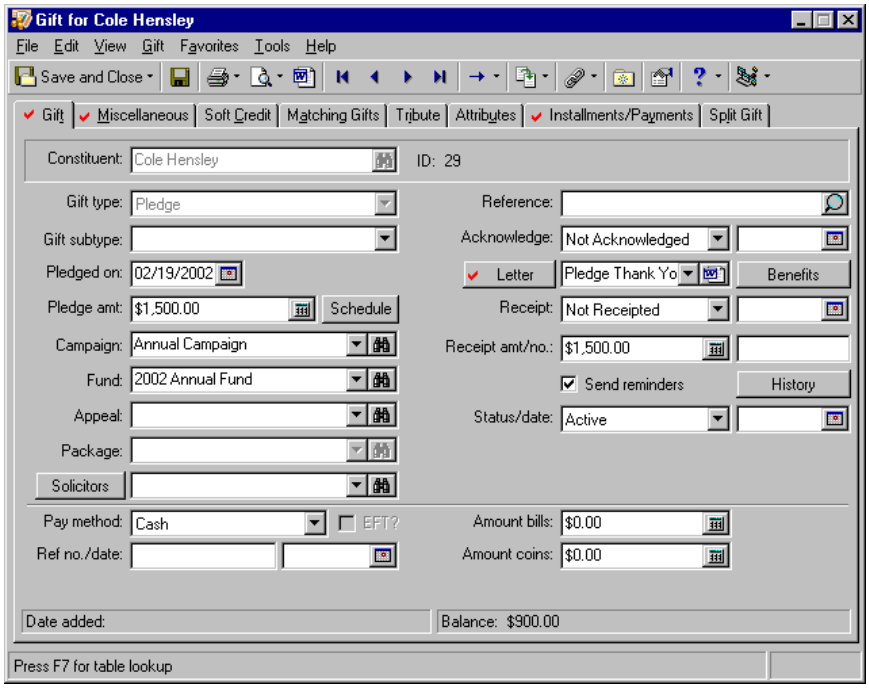
If an installment is partially paid, the amount due cannot be changed to less than the payment previously applied to the installment. For example, if Mark Adamson has four installments of $100 and pays $75 of the first installment, the new payment amount cannot be less than $75.

If a new first installment is created, the date of the first payment of the pledge is also updated. If the date of the first installment does not match the first payment date on the pledge, a warning message appears asking whether you want to change the first payment date of the pledge to the first installment date.

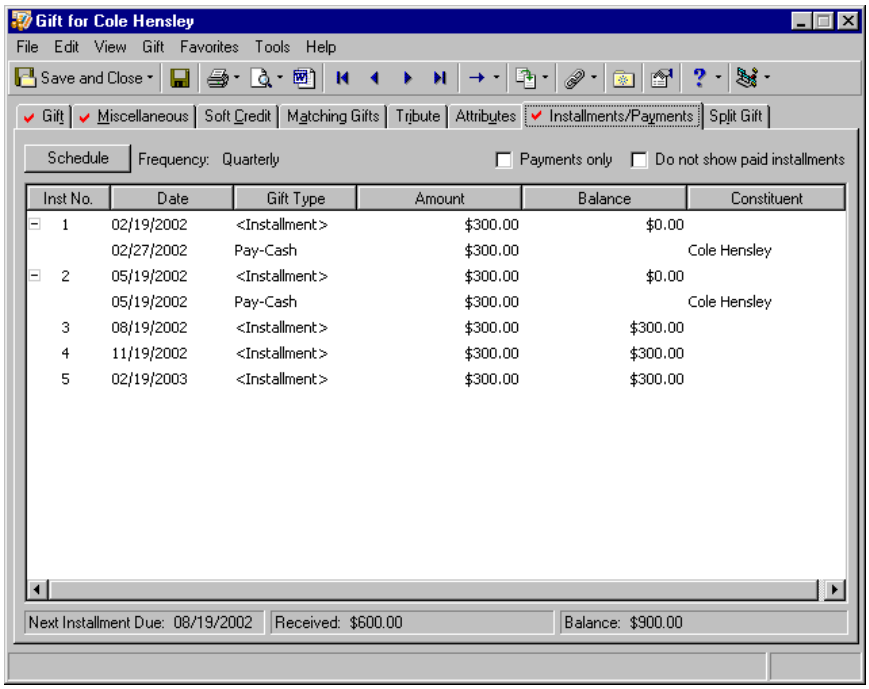
Rescheduling a pledge

Scenario: Cole Hensley needs to reschedule the $1,500 pledge he made on February 19, 2002. Cole already made one payment of $300. Business is a little slower than he anticipated, so he would like to change his remaining four quarterly installments of $300 to 10 bimonthly installments of $120.

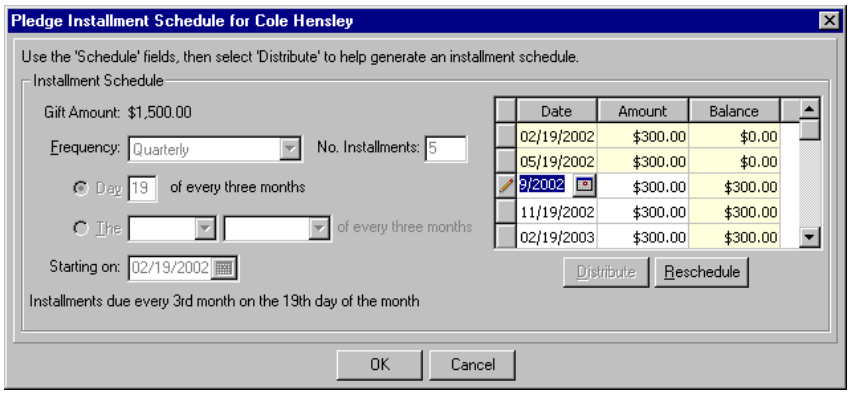
1. From Cole Hensley's 02/19/2002 pledge gift record, select the Gift tab. For more information about opening a pledge gift record, see "Accessing a Pledge Gift Record" on page 140.



2. Select the Installments/Payments tab.



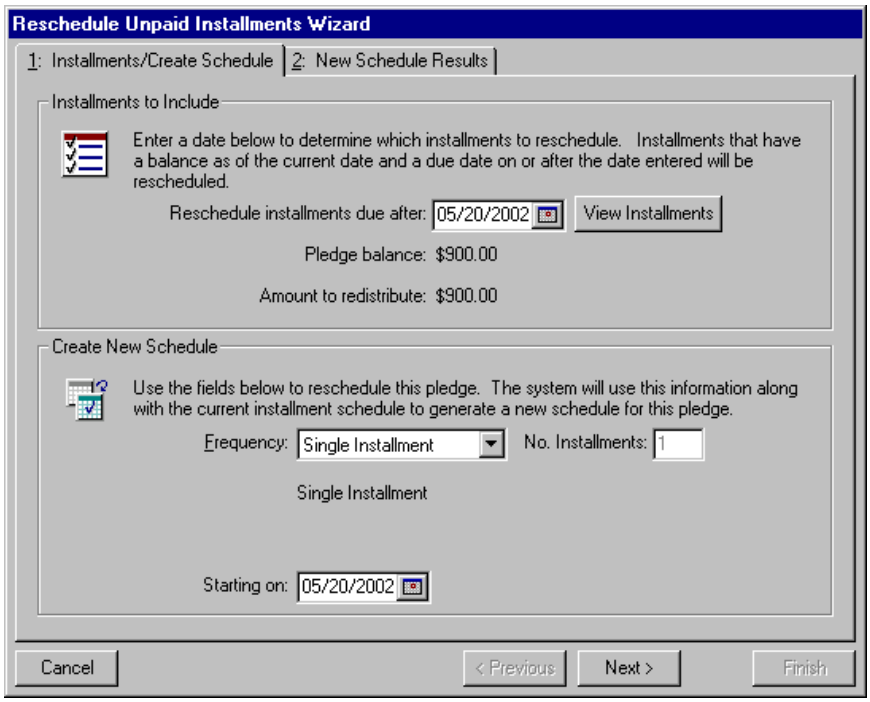
3. Click **Schedule**. The Pledge Installment Schedule screen appears.



4. Click **Reschedule**.

Note: Remember, only unpaid installments can be rescheduled.

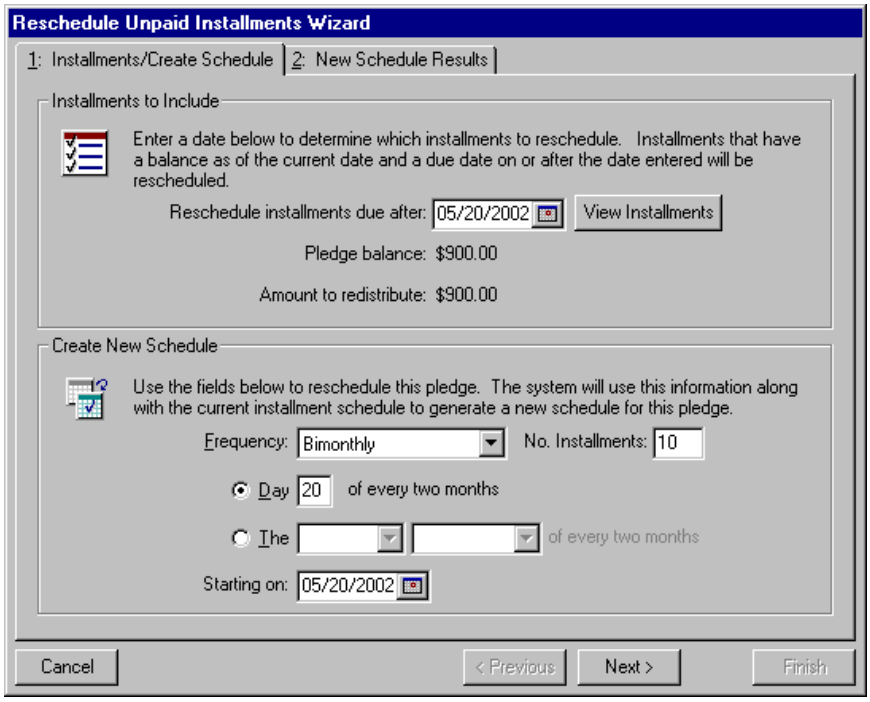
5. When the Reschedule Unpaid Installments Wizard appears, select the Installments/Create Schedule tab.



Note: You can view the original installment schedule by clicking the **View Installments** button.

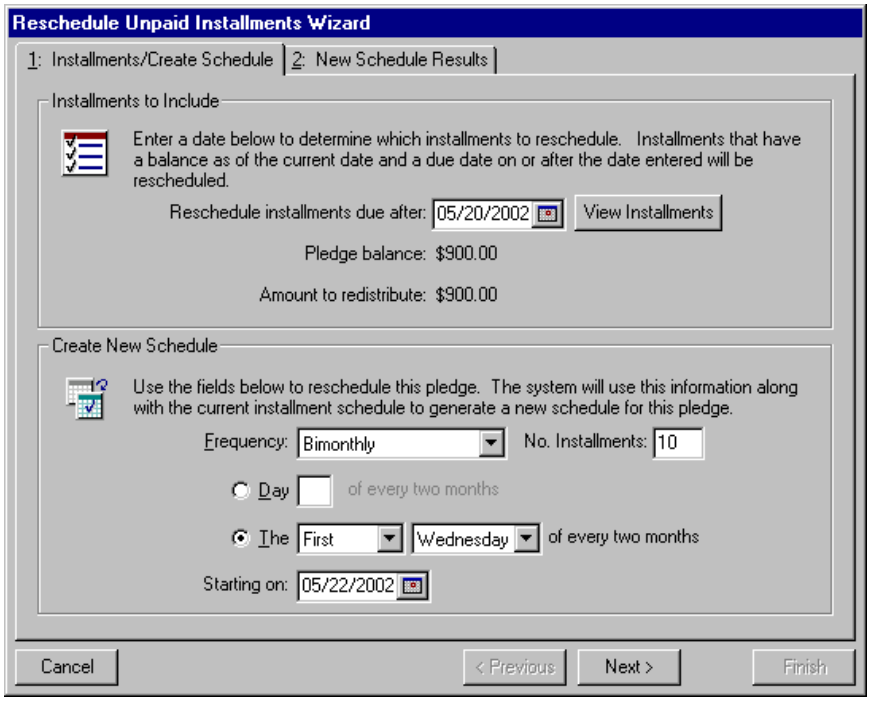
6. In the **Reschedule installments due after** box, the program defaults the due date for the first installment. Because Cole has made one payment, you need to reschedule the installments, beginning with the second installment due on 05/20/2002. In this case, it is not necessary to change the default.
7. In the **Create New Schedule** frame, select "Bimonthly" in the **Frequency** field. Cole is fulfilling his original pledge on a new bimonthly schedule.

8. In the **No. Installments** box, enter “10” because the payment schedule for the $1,500 pledge is now $120 every two months.



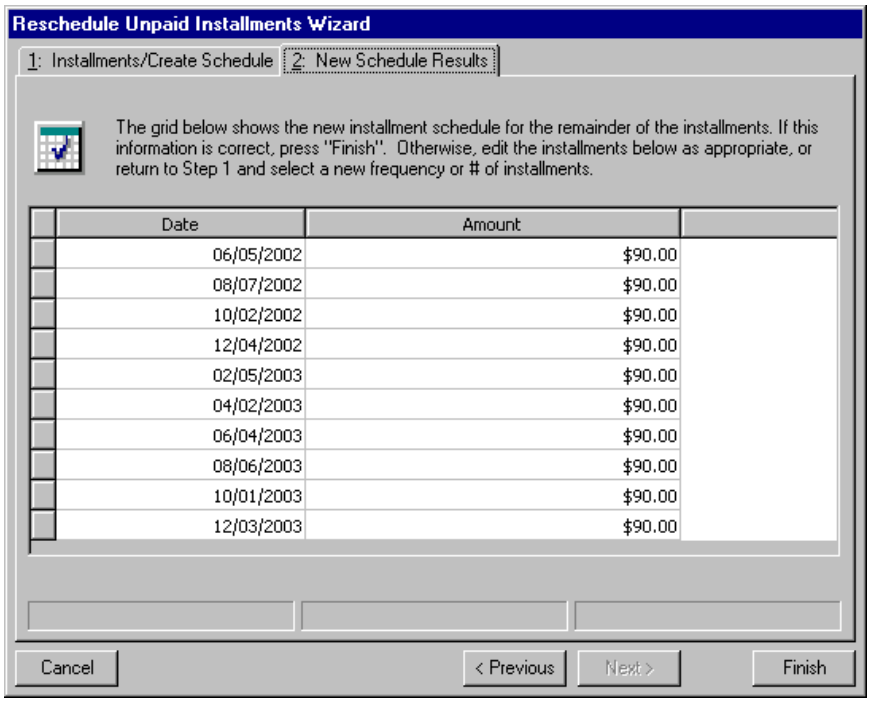
9. Mark **The [ ] [ ] of every two months** option. Cole pledges to make $90 payments on the first Wednesday of every two months.
10. In the first field of **The [ ] [ ] of every two months** option, select “First”.
11. In the second field of **The [ ] [ ] of every two months** option, select “Wednesday”. The option now reads **The First Wednesday of every two months**.

12. In the **Starting on** field, enter the date 05/22/2002. This is the date the new pledge installment schedule for Cole takes effect.



Note: If you reschedule the entire installment schedule for a pledge, the **Update 'schedule' fields upon save** checkbox appears in the lower left corner of the New Schedule Results tab. Mark this checkbox to automatically update the fields on the Pledge Installment Schedule screen.

13. Click **Next**. The New Schedule Results tab appears displaying the new installment schedule, with ten $90 payments paid on the first Wednesday of every other month.

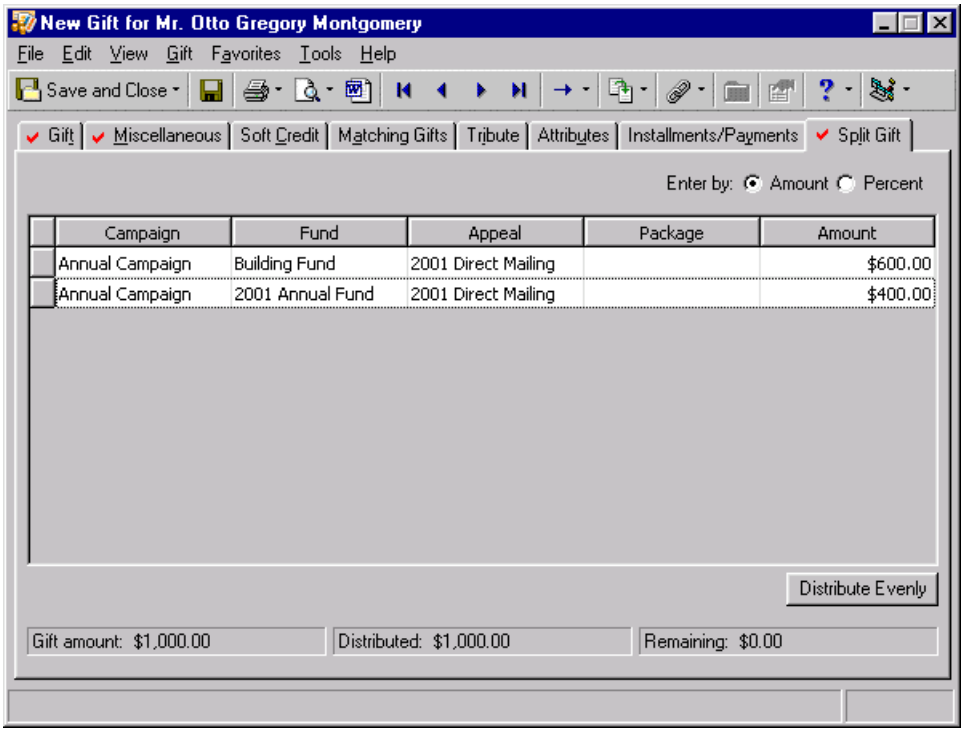


14. Click **Finish**. You return to the Pledge Installment Schedule screen.
15. Click **OK**. You return to the Cole's pledge gift record.
16. To save the scheduling changes to the database and close the gift record, click **Save and Close** on the toolbar.

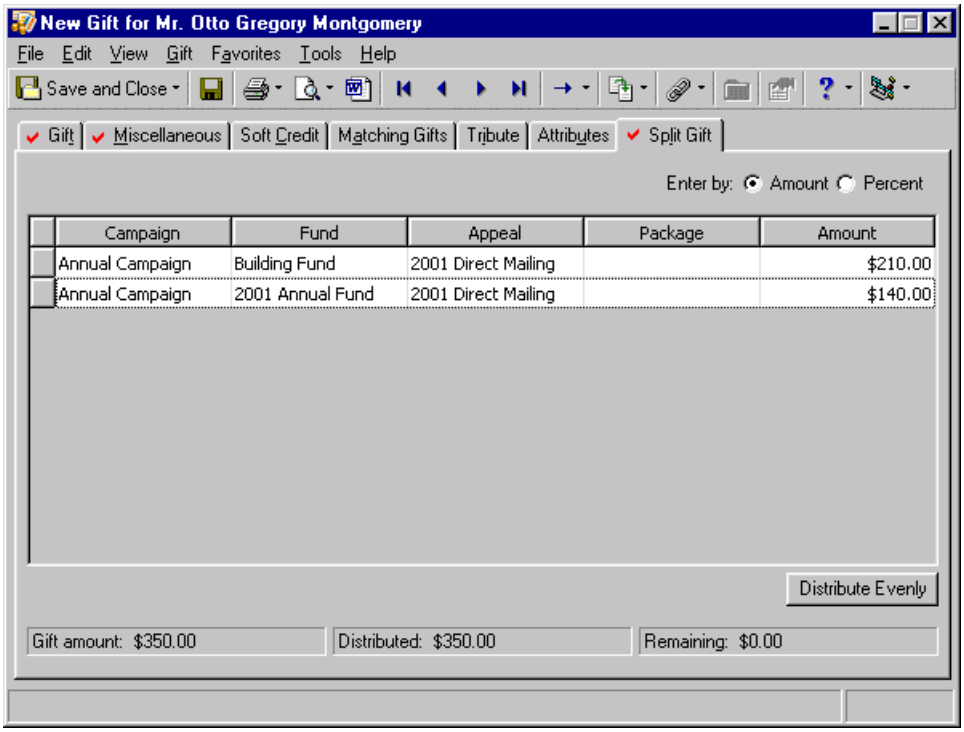
Split Gift Tab For Pledges

You should think carefully about splitting a Pledge among campaigns, funds, appeals, and packages when you add gifts from *Records*. This can affect reporting in the future. Depending on how you enter your gift information, your report calculations vary in *Reports*.

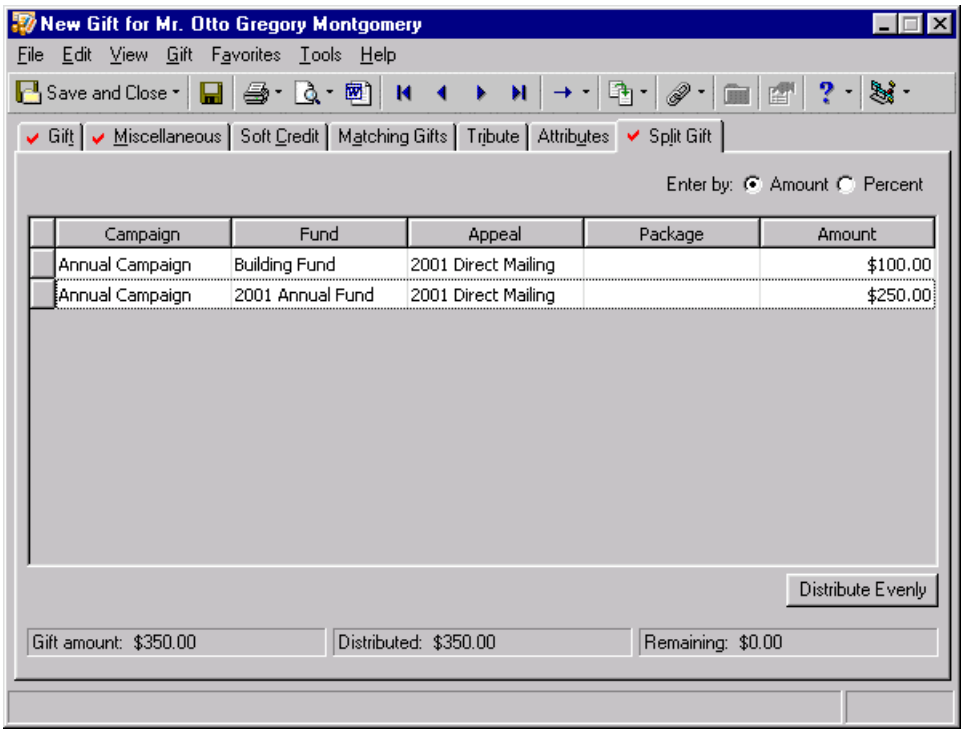
For example, Otto Montgomery donates $1000 to your organization and requests that $600 go to the Building Fund and $400 go to the 2001 Annual Fund.



The next month, Otto makes a pledge payment of $350. He requests that $100 go to the Building Fund and $250 go to the 2001 Annual Fund. After you add this information on the Gift tab and apply the $350 payment to the split Pledge, ***The Raiser's Edge*** automatically distributes an amount on the Split Gift tab. The amount that automatically distributes is based upon the percent distribution of the gift on the Pledge Split Gift tab. In this example, the Pledge split gift is 60 percent toward the Building Fund and 40 percent toward the 2001 Annual Fund. Therefore, the payment amounts default to $210 for the Building Fund and $140 for the 2001 Annual Fund.

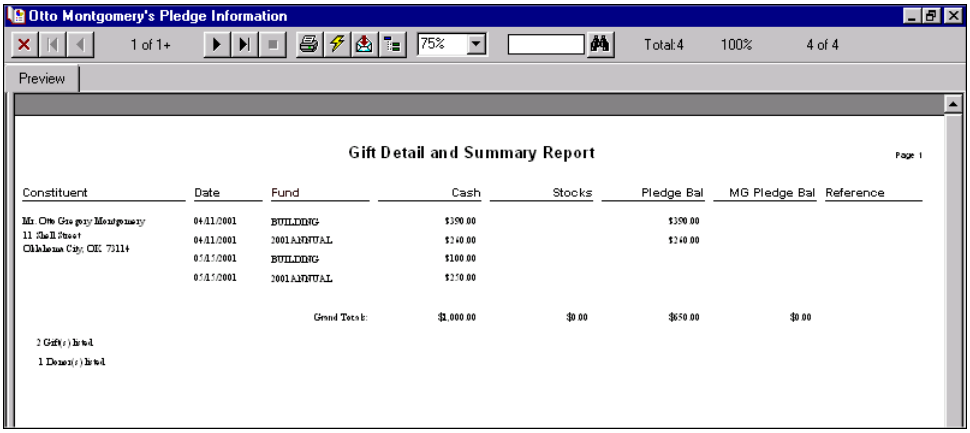


Because Otto requested how to split his pledge payment, you overwrite the amounts the program defaults in the **Amount** column to correctly apply the payment.

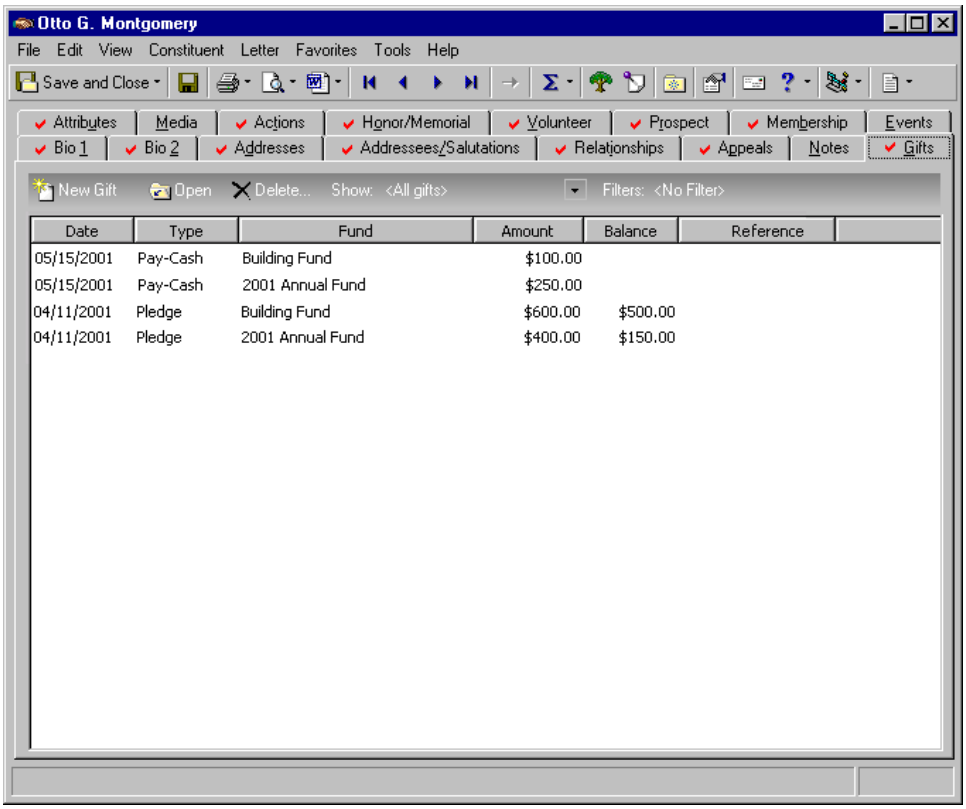


Note: Balance calculations vary depending on the selections you make on report tabs. For more information on the Gift Detail Report options, see the *Reports Guide*.

In *Reports*, if you process the Gift Detail Report, your pledge balance calculates using the amounts that originally default on the Split Gift tab. Note: these are not the amounts you manually overwrite on the Split Gift tab.



Using this same example, you can enter Otto's pledge as two separate gifts. When you add his $350 payment to the Gift tab, you can also enter this as two separate payments and correctly apply the payment to each fund.



By entering the Pledge gift this way, the Gift Detail Report calculates the pledge balances using the payment amounts that Otto requested.

Adding a New Pledge

When a constituent agrees to donate a gift to your organization in the future, you need to enter the gift into your ***Raiser's Edge*** database by creating a pledge gift record. For example, your organization is beginning a campaign to raise funds for a new park in your community. Orla McGrann, one of your solicitors, contacts Northern Industries to ask for a donation for this campaign. Northern Industries agrees to donate $5000 later in the month. To record that you received a pledge, you need to create a pledge gift record for Northern Industries.

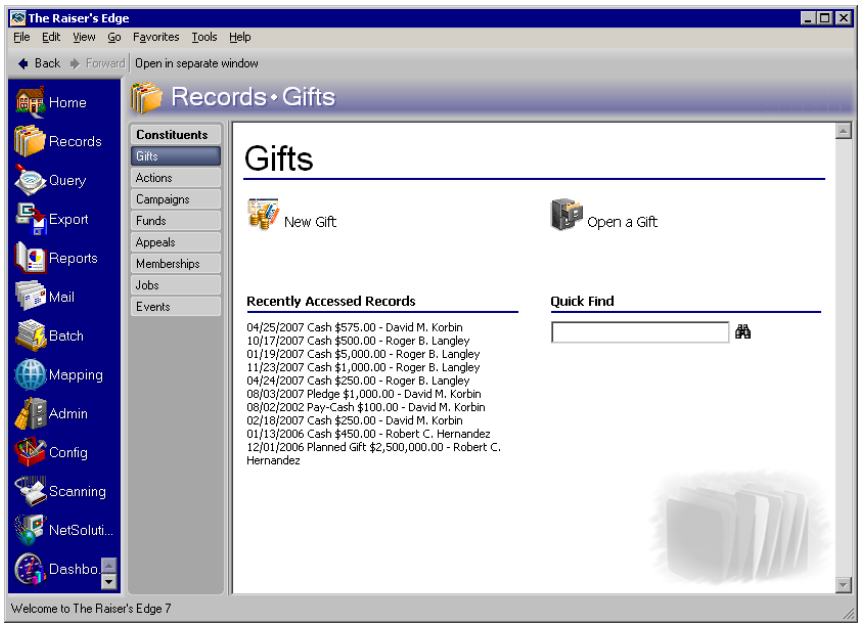
- **Adding a new pledge**

> ***Scenario:*** All Track International installs playground and track equipment for schools and universities. You just started a campaign for a new playground, so Anne Sinclair, a solicitor, contacts All Track International and motivates them to pledge $500 toward the New Playground Campaign's goal. All Track International plans to pay this pledge at the end of the month and requests you send a pledge reminder before the pledge is due.

Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

1. On the Raiser's Edge bar, click **Records**.

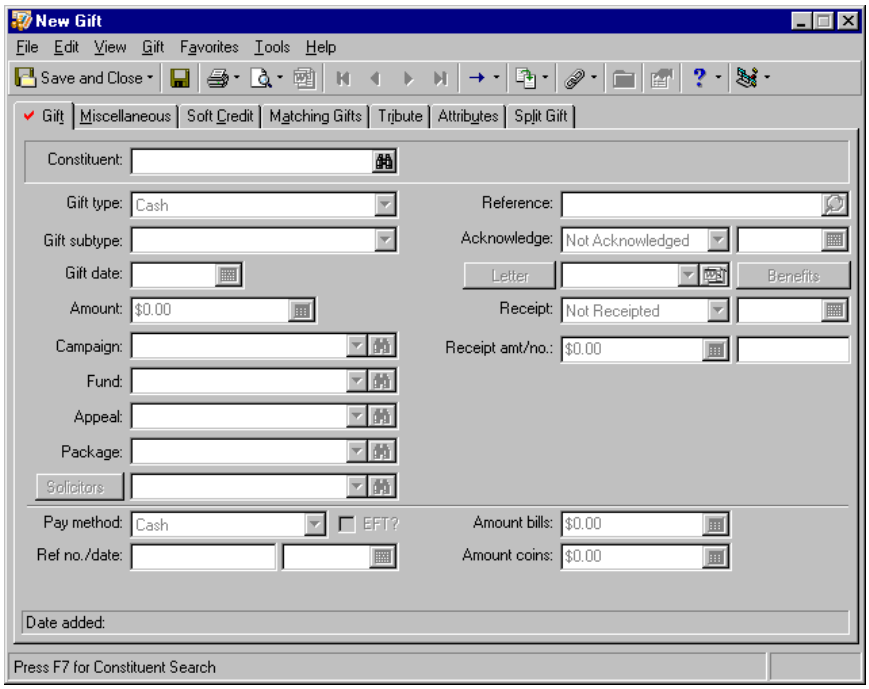
2. Click the **Gifts** link. The Gifts page appears.



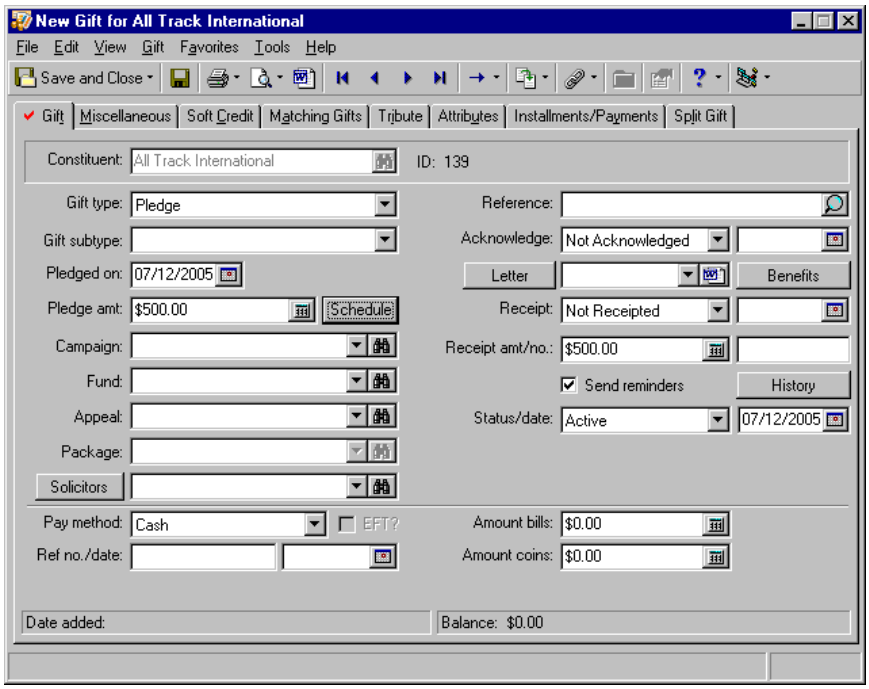
3. Click **New Gift**.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that reads "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

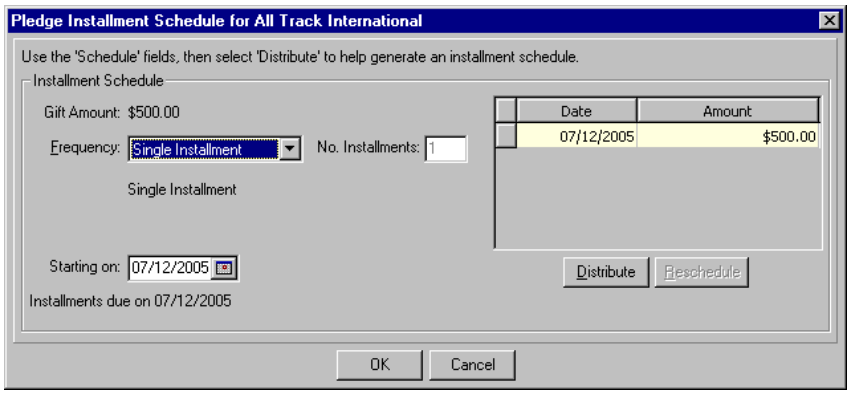
4. From the New Gift screen, select the Gift tab.



5. In the **Constituent** field, click the binoculars and search for All Track International in your database. When found and selected, the name appears in the **Constituent** field. For more information about searching for a constituent, see the *Program Basics Guide*. After you enter a name in the **Constituent** field, the program disables the field.
6. In the **Gift type** field, select “Pledge”.
7. In the **Pledged on** field, enter the date 07/12/2005. This is the date All Track International pledged the gift.
8. In the **Pledge amt** field, enter the amount $500 because All Track International pledged $500 to your organization.

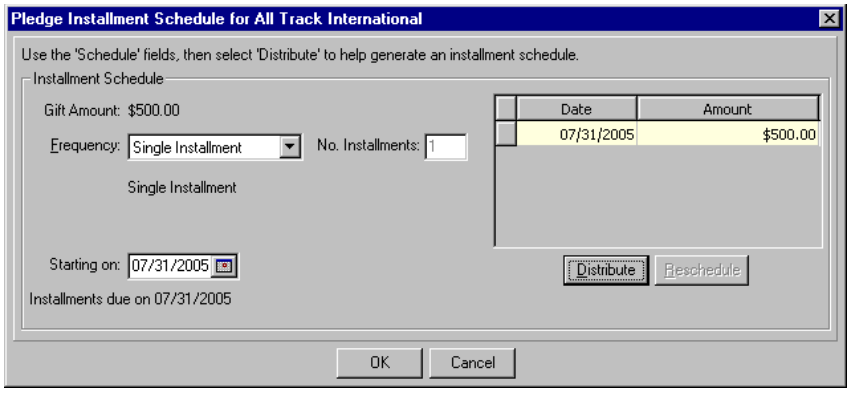


9. Click **Schedule**. The Pledge Installment Schedule screen appears.



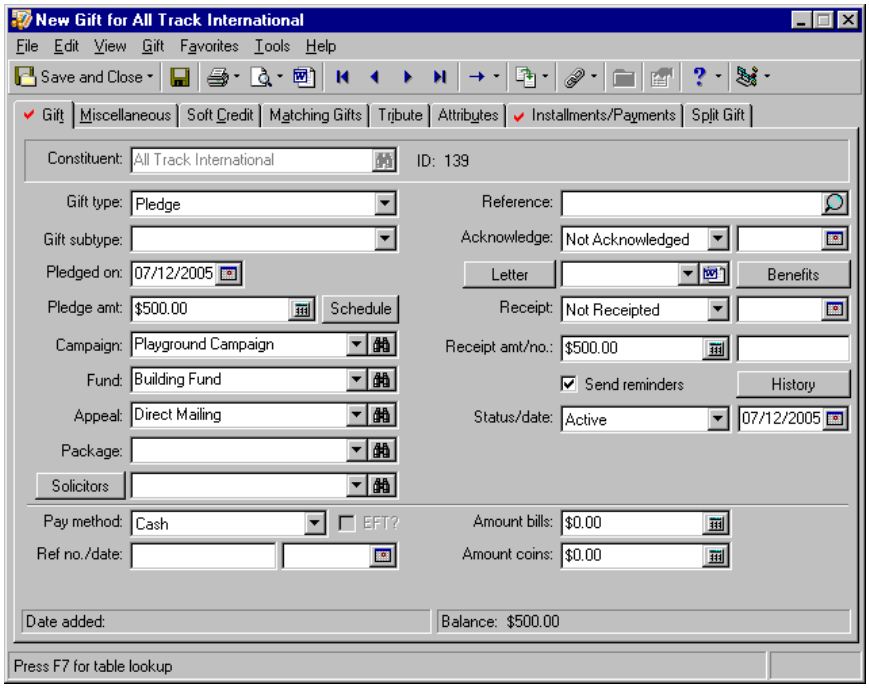
10. In the **Frequency** field, select “Single Installment”. When you select Single Installment, the program automatically enters “1” in the **No. Installments** field and disables the field.
11. In the **Starting on** field, the program defaults the **Pledged on** date, which is 07/12/2005. Because All Track International wants to pay the pledge at the end of the month, change this date to 07/31/2005.

12. To update the installment schedule in the grid, click **Distribute**. The installment schedule grid displays the due date and amount for each pledge payment. Because All Track International is paying the pledge in one installment, the grid displays one $500 payment scheduled for July 31, 2005.



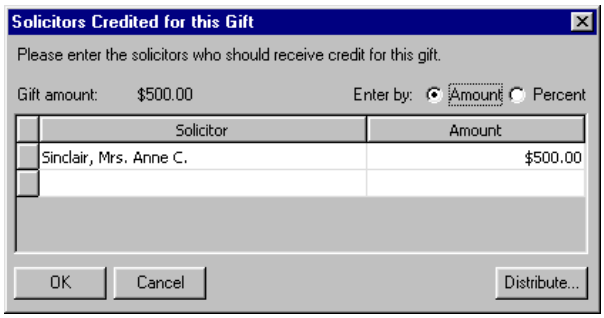
13. Click **OK**. You return to the New Gift screen.
14. In the **Campaign** field, select “New Playground Campaign”.
15. In the **Fund** field, select “Building Fund”.
16. In the **Appeal** field, select “Direct Mailing”.

    If a default appeal is not correct for a gift, you can use the drop-down arrow or the binoculars to select a different appeal.



Warning: If Anne Sinclair is not listed as a solicitor on the Relationship tab of All Track International’s constituent record when you save the gift record, the program asks if you want to add Anne as one of All Track International’s assigned solicitors. Click **Yes** and enter details about the assignment on the New Solicitor Assignment screen. For more information, see the Solicitors chapter of the *Constituent Data Entry Guide*.

17. Click **Solicitors**. The Solicitors Credited for this Gift screen appears.



18. Click the binoculars to search your database for Anne Sinclair. When found and selected, Anne Sinclair appears in the **Solicitor** column.
19. Credit Anne Sinclair for the full amount of the gift. For more information about crediting solicitors for a gift, see “Crediting Solicitors for a Gift” on page 32.
20. Click **OK**. You return to the gift record.

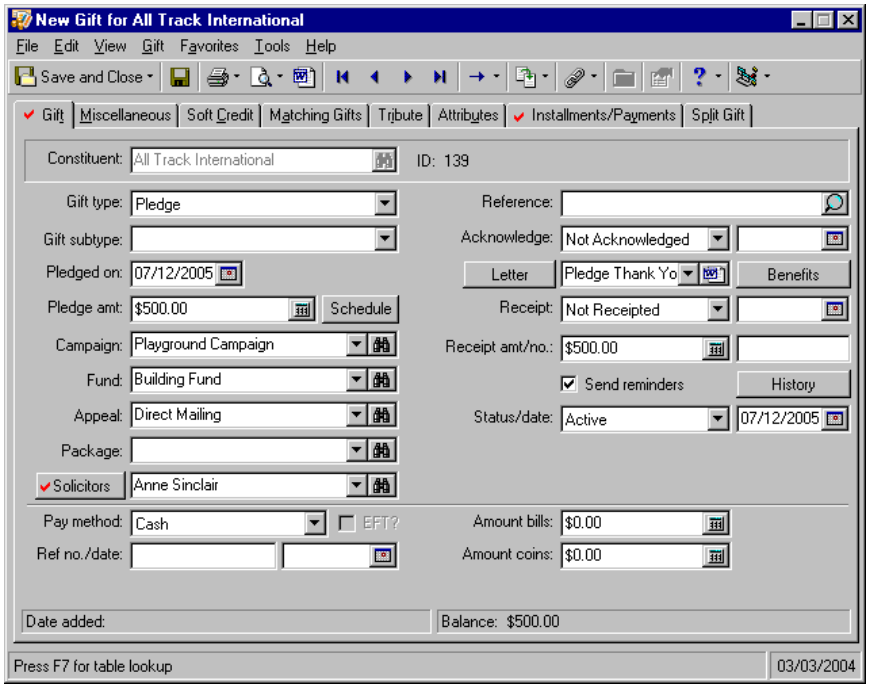
Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

21. In the **Acknowledge** field, select “Not Acknowledged”. You plan to generate a thank you letter through *Mail*, so you do not need to enter a reference date. *Mail* can automatically update the **Acknowledge** and date fields after you generate the letter. For information on generating letters through *Mail*, see the *Mail Guide*.
22. In the **Letter** field, select “Pledge Thank You” because you plan to send this mail merge letter to All Track International. In *Configuration*, you define the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
23. In the **Receipt** field, select “Do Not Receipt”. Because a pledge does not represent an actual gift, you do not need to print a receipt. When you receive a payment for this pledge, you can create a receipt for the gift. You can also leave the **Receipt amt/no.** fields blank.

Note: To view pledge reminders previously sent to All Track International for this pledge, click the **History** button. For more information, see “Viewing the Pledge Reminder History” on page 190.

24. Because All Track International requested that you send a pledge reminder, mark the **Send reminders** checkbox.

25. In the **Status/date** field, select “Active” and enter the date 07/12/2005.



26. To add the gift to your database, click **Save and Close** on the toolbar.

Applying a Payment Toward a Pledge

Pledges can be paid with gift types of Cash, Stock/Property, Gift-in-Kind, and Other. To pay a pledge, you add a new gift record for the pledge payment and select the gift type the constituent used to pay the installment. For example, if All Track International sends a $500 check to pay their pledge, you need to create a new gift record with a gift type of Cash.

We recommend you set the outstanding pledge business rule explained in “Pledge Business Rules” on page 141. When you set this business rule and add a gift for a constituent with an outstanding pledge, the program reminds you the gift may be a payment toward the pledge.

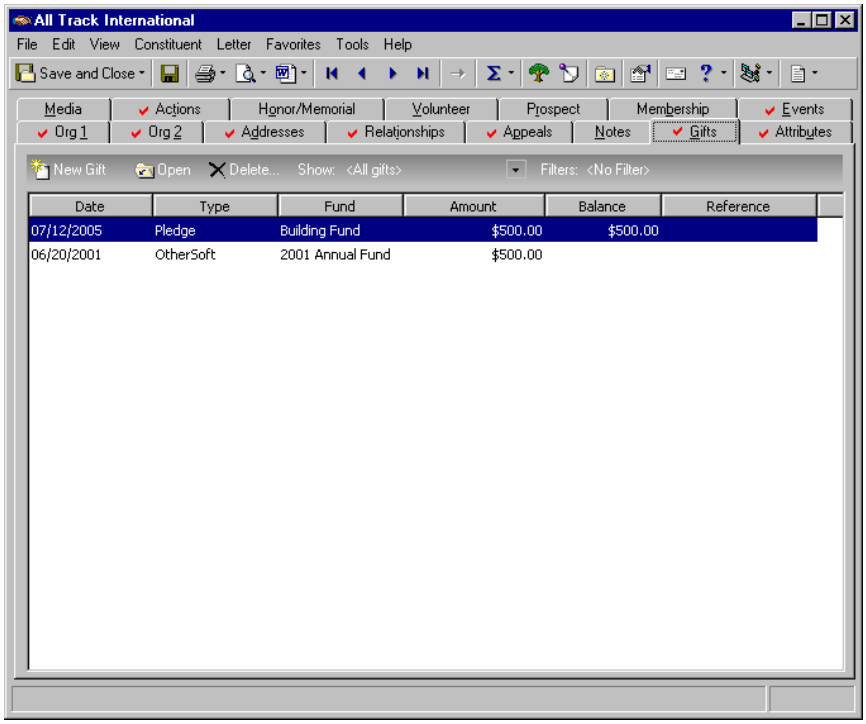
Constituents can make payments toward their own pledges or pledges made by other constituents. For example, Georgia Thomas pledged $100 to your organization. Because of a change in her financial situation, she can no longer pay the pledge. Georgia’s aunt, Lisa Haas, is also a constituent in your database. Lisa agrees to pay the pledge for Georgia. You add the gift in Lisa’s name and apply the payment to reduce the balance of Georgia’s pledge.

- **Applying a payment toward a pledge**

> ***Scenario:*** On July 31, 2005, All Track International sent check number 1408 to pay the $500 pledge made on July 12, 2005. Before you can apply a payment toward a pledge, you need to add a pledge gift record to your database. This scenario uses the pledge added in “Adding a new pledge” on page 159.

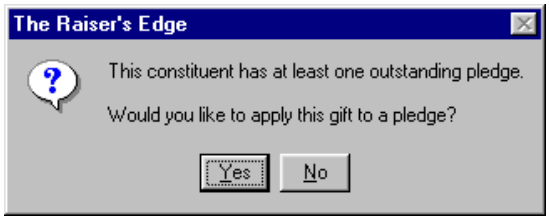
Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

1. From All Track International's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



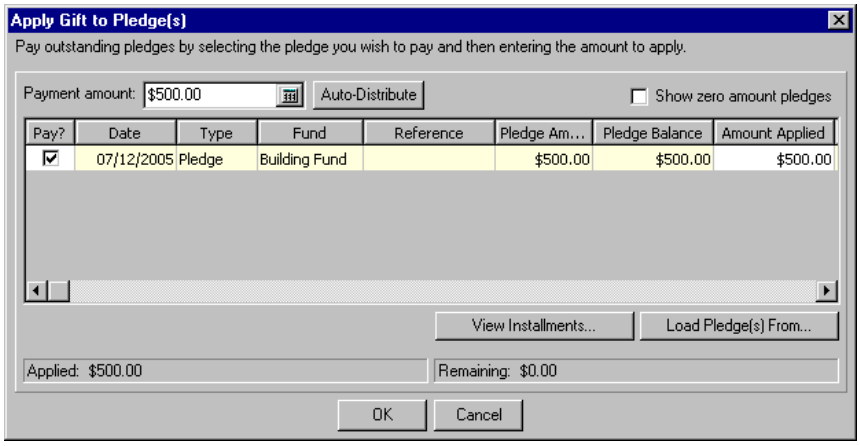
Note: This message appears if you mark the **When adding a gift warn if constituent has outstanding pledge balances** checkbox in the **Business Rules** section of *Configuration*. If this message does not appear, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**.

2. On the action bar, click **New Gift**. The program displays a message.



Note: When a constituent has several pledges, you can specify the pledges you want to pay by marking the checkbox in the **Pay?** column next to the pledge you want to pay. After you select the pledges you want to pay, click **Auto-Distribute**.

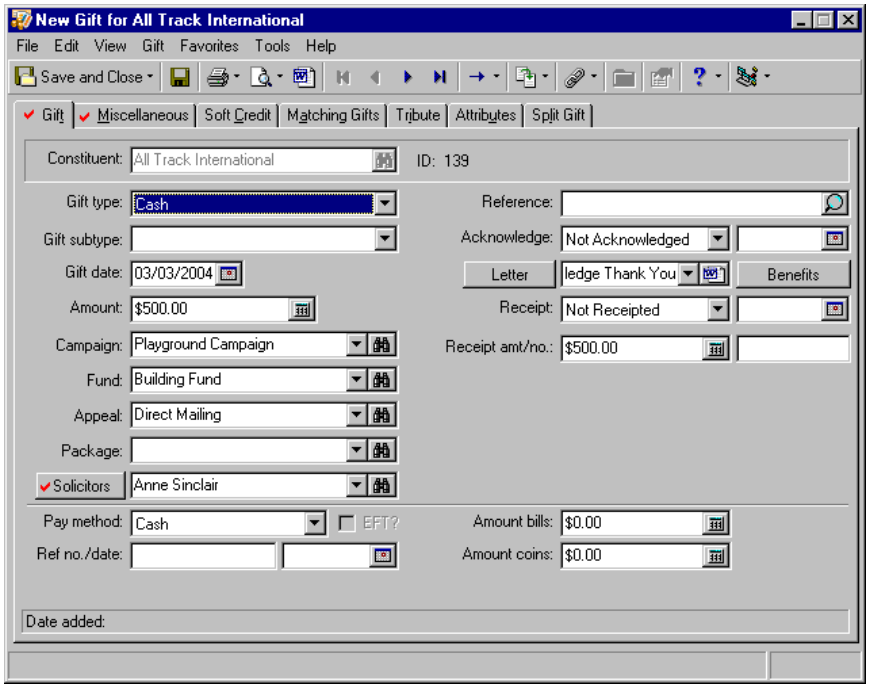
3. Click **Yes** to apply All Track International's payment toward their existing pledge. The Apply Gift to Pledge(s) screen appears.



Note: The status bar displays the amount **Applied** and the amount **Remaining** for this pledge.

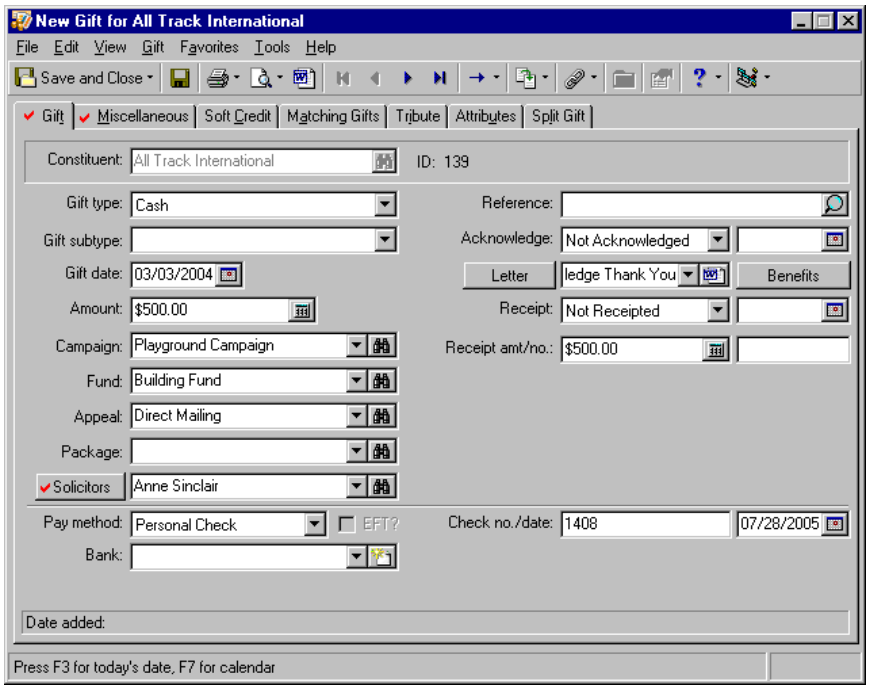
4. To automatically apply the gift to All Track International's outstanding pledge, click **Auto-Distribute**.

5. Click **OK**. You return to the gift record. The **Amount**, **Campaign**, **Fund**, **Appeal**, **Package**, **Solicitor**, **Letter**, and **Receipt** fields default from the pledge gift record into the appropriate fields on this gift record. Today's date defaults in the **Gift date** field.



6. In the **Receipt** field, select "Not Receipted" because you want to create a receipt for the pledge payment in *Mail*. For more information about creating receipts, see the Receipts chapter of the *Mail Guide*.
7. In the **Pay method** field, select "Business Check".

8. In the **Check no./date** fields, enter the check number “1408” and the date 07/28/2005.

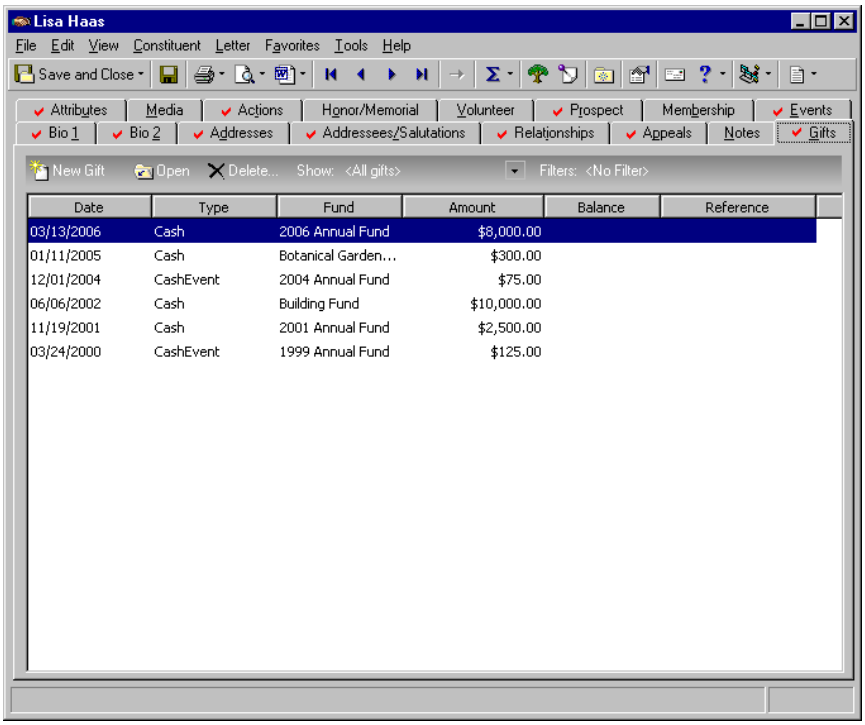


9. To add the gift to your database, click **Save and Close** on the toolbar.

Paying a pledge for another constituent

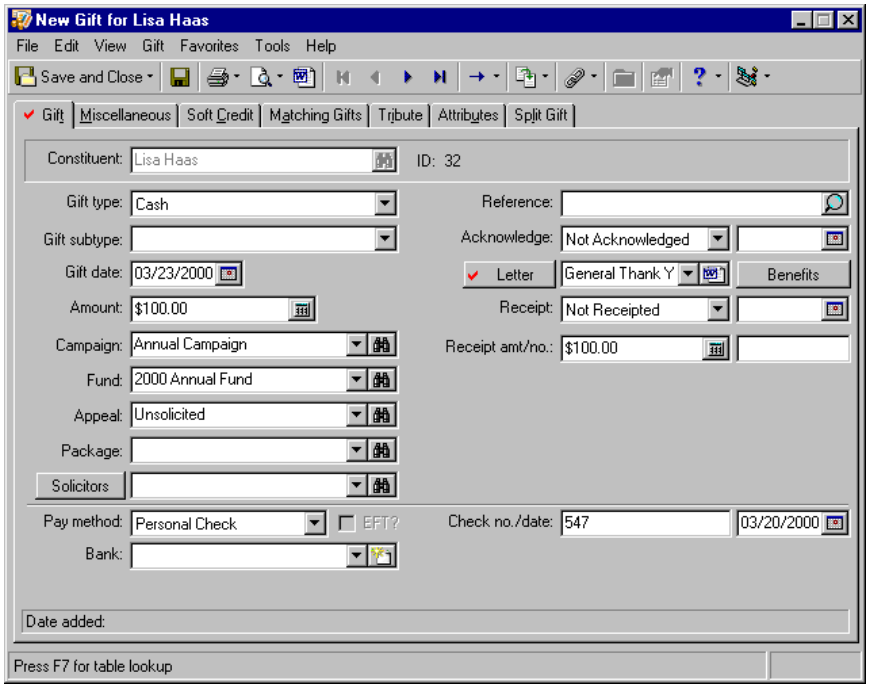
Scenario: Georgia Thomas pledged $100 on February 23, 2000. Georgia did not receive her anniversary bonus because her employer sold his business on March 1, 2000. Determined to pay her pledge, Georgia convinced another of your constituents — her aunt, Lisa Haas — to make the pledge payment. You just received a $100 pledge payment from Lisa Haas. Now, you need to create a gift record for Lisa's payment and apply it to Georgia's existing pledge.

1. From Lisa Haas's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

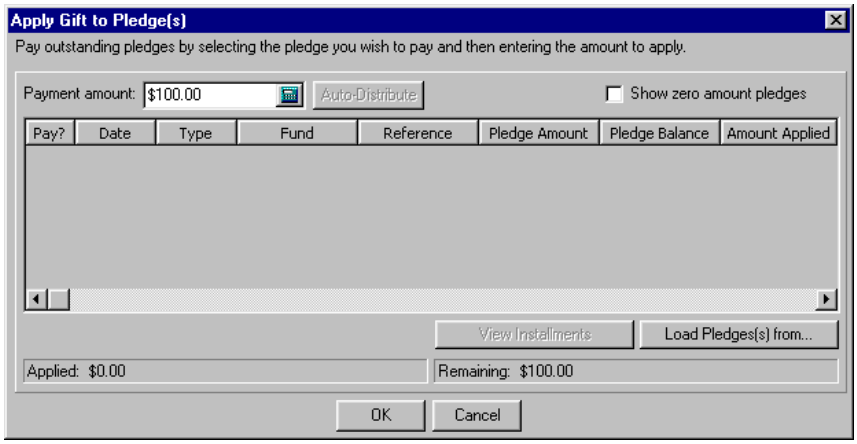


2. On the action bar, click **New Gift**.

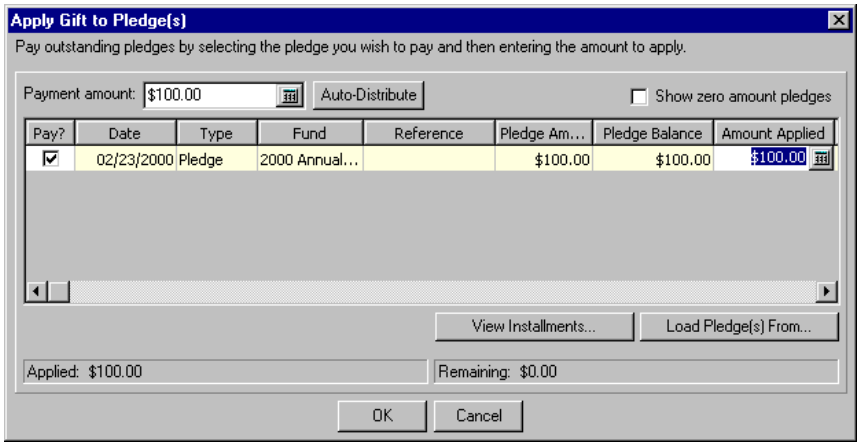
3. From the New Gift screen, select the Gift tab and add the information about Lisa's gift as shown on the screen below. For more information about adding a gift record, see "Adding a Cash gift" on page 68.



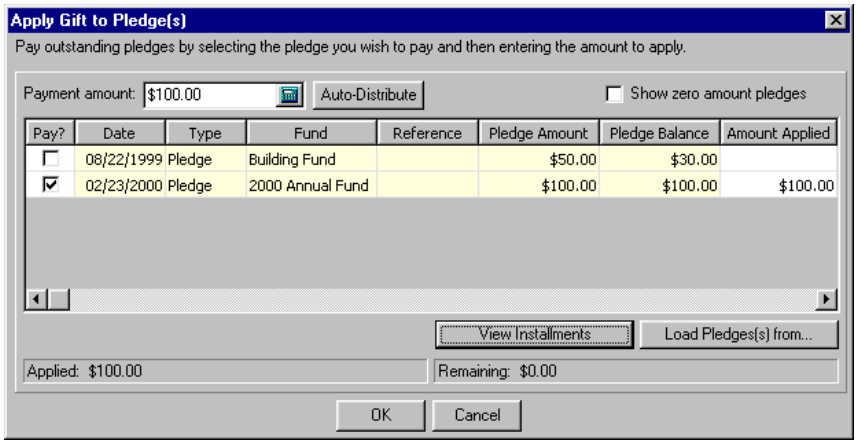
4. To apply Lisa's gift to Georgia's pledge, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears. The amount you entered in the **Amount** field on Lisa's gift record defaults in the **Payment amount** field.



5. Click **Load Pledge(s) from**. The Open screen appears so you can search for Georgia Thomas in your database. When you find and select Georgia, her outstanding pledges appear in the grid on the Apply Gift to Pledge(s) screen.



6. In the **Pay?** column, mark the checkbox in the row containing Georgia's pledge made on February 23, 2000.
7. In the **Amount Applied** column for Georgia's pledge made on February 23, 2000, enter the amount $100. When you leave the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $100.



8. Click **OK**. You return to Lisa's gift record.
9. Click **Save and Close** on the toolbar. Lisa's gift is now paying Georgia's pledge.

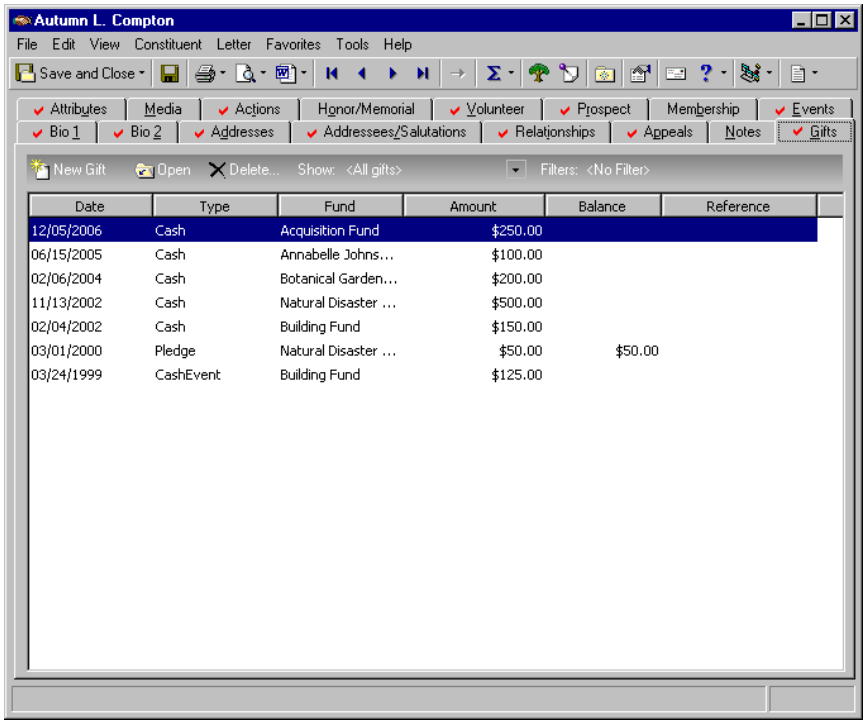
Overpaying Pledges

Occasionally, a constituent may overpay a pledge, which means an installment amount is greater than the pledge balance. When this happens, you can either create a cash gift for the difference, equal the gift amount to the applied amount, or increase the amount of the original pledge.

Overpaying a pledge

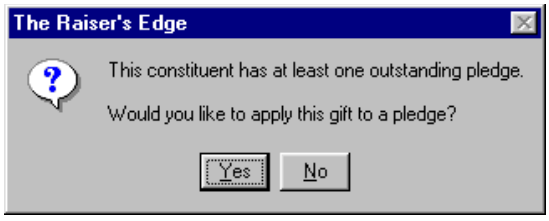
Scenario: On March 1, 2000, Autumn Compton pledged $50 to your organization's Natural Disaster Relief Campaign. Payments from her stock fund increased, so she decided to send a check for $100 instead of $50.

1. From Autumn Compton's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

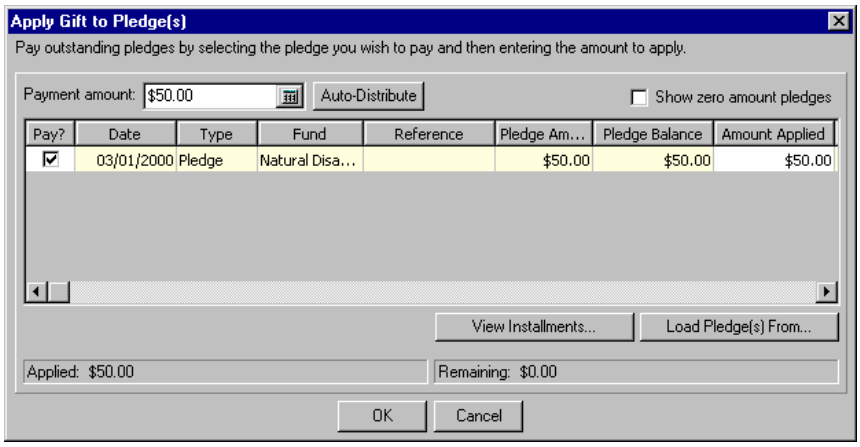


Note: This message appears if you mark the **When adding a gift warn if constituent has outstanding pledge balances** checkbox in the **Business Rules** section of *Configuration*. If this message does not appear, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**.

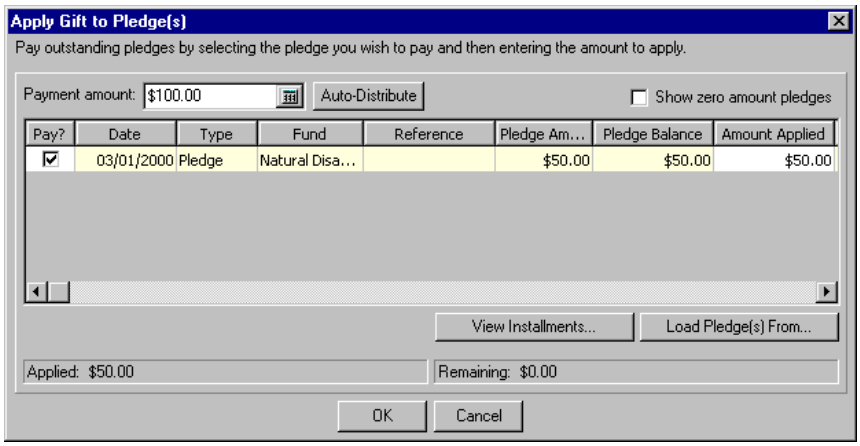
2. On the action bar, click **New Gift**. The program displays a message.



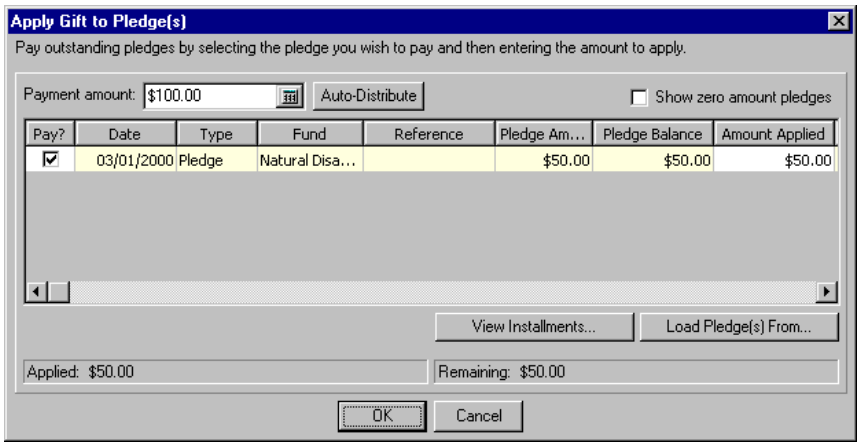
3. Click **Yes**. The Apply Gift to Pledge(s) screen appears.



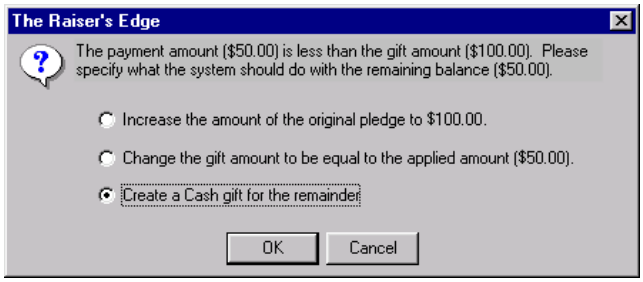
4. In the **Payment amount** field, enter the total amount of $100. This is the donation amount written on Autumn's check.
5. In the **Pay?** column, mark the checkbox next to Autumn's $50 pledge.



6. Click **Auto-Distribute**. The amount in the **Remaining** field of the lower right status bar updates to $50.



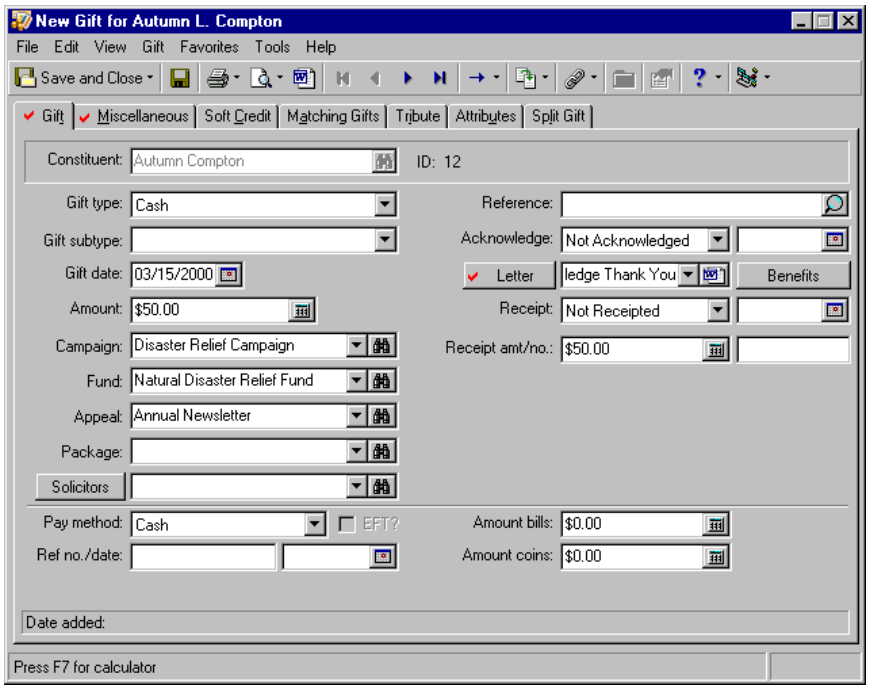
7. Click **OK**. A message appears asking if you want increase the original pledge amount, change the gift amount to equal the applied amount, or create a cash gift for the remainder.



8. To create a separate cash gift record for the remainder, select the **Create a cash gift for the remainder** option.

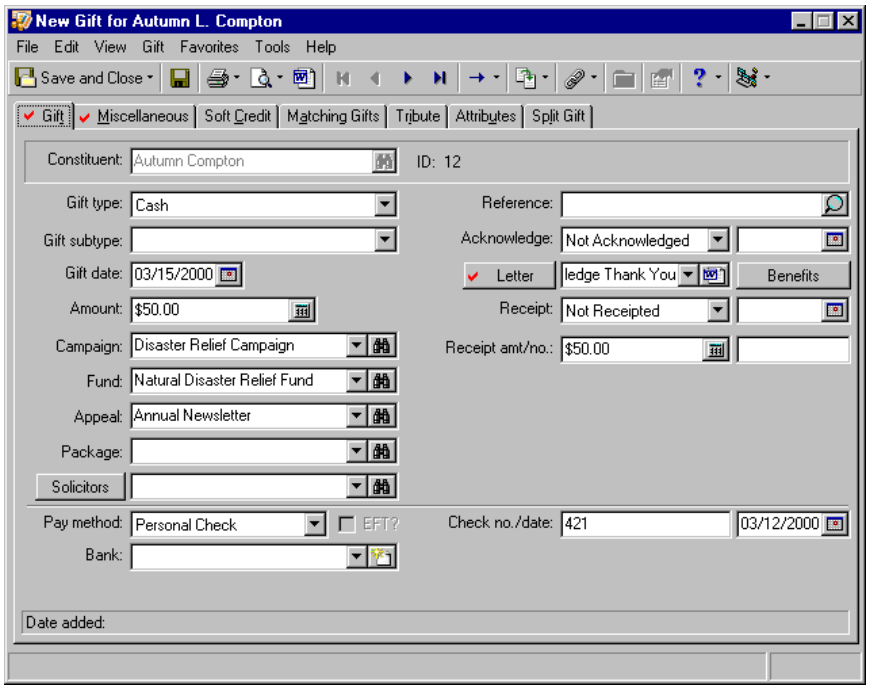
   If you increase the amount of the original pledge, you change the original pledge gift record **Amount**. If you equal the gift amount to the applied amount, you change the **Amount** field to equal the amount in the **Amount Applied**. For example, you enter $100 in the **Amount** field on the Gift tab and enter $150 in the **Amount Applied** column on the Apply Gift to Pledge(s) screen. When you select **Change the gift amount to be equal to the applied amount**, the $100 in the **Amount** field changes automatically to $150. If you create a cash gift, you add a new gift for the constituent.

9. Click **OK**. You return to Autumn's gift record. The program defaults information from the pledge gift record. Note the **Amount** field is $50.

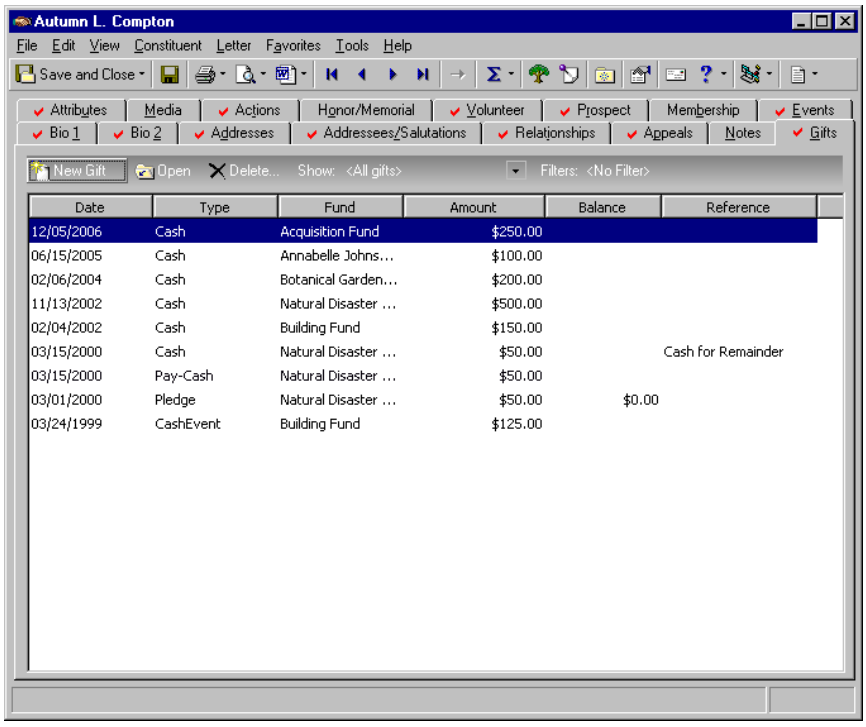


10. In the **Pay method** field, select "Personal Check".

11. In the **Check no./date** fields, enter the check number 421 and the check date 03/12/2000.



12. Click **Save and Close** on the toolbar. You return to the Gifts tab of Autumn's gift record.



13. In the Gifts grid, two additional gift records with a **Date** of 03/15/2000 appear in the grid. The gift record with a gift type of Pay-Cash is the gift record applied to Autumn's pledge. The gift record with the reference of "Cash for remainder" is the gift record for the overpayment of $50.
14. To close Autumn's constituent record, click **Save and Close** on the toolbar.

Adjusting a Pledge

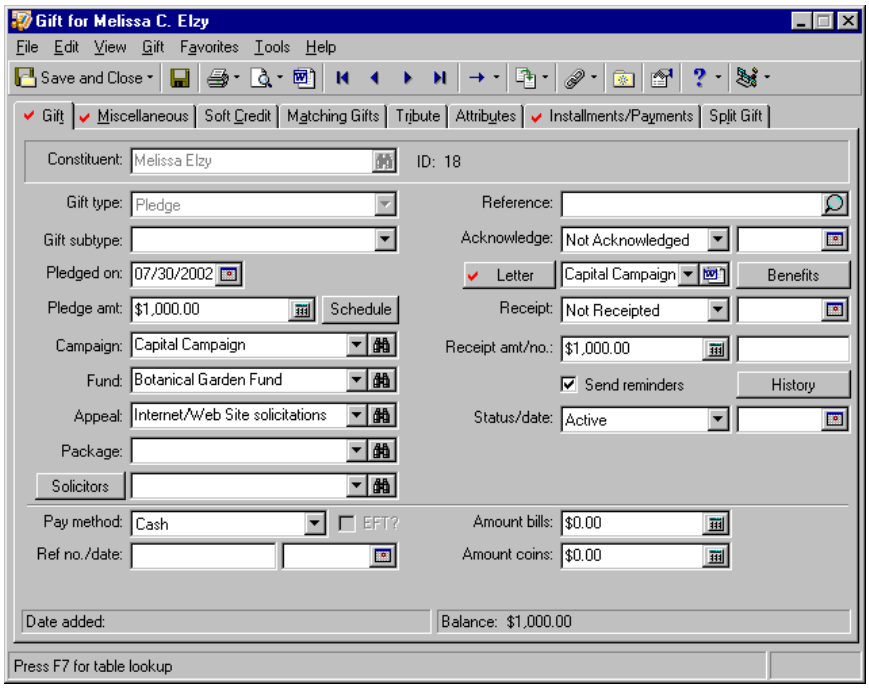
If a pledge gift record contains data entry errors, you need to adjust the pledge. Possible errors can include the wrong pledge amount, fund, or solicitor.

You make the first adjustment to a pledge by selecting **Gift**, **Adjust** from the menu bar. Once the pledge has been adjusted, future adjustments must be made from the Adjustments tab. For more information about the Adjustments tab, see the Adjusting a Gift section in the Gift Record chapter.

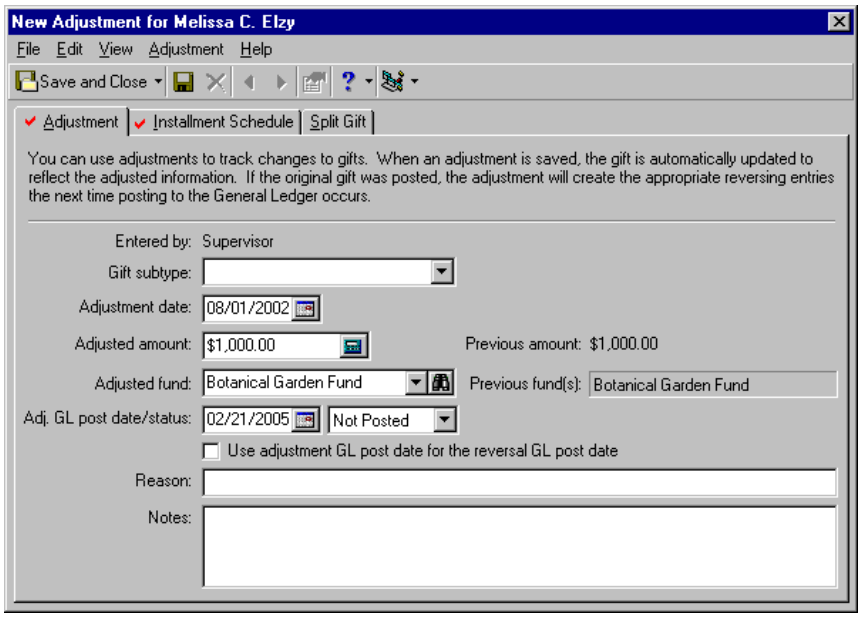
Adjusting a pledge

Scenario: A pledge from Melissa Elzy was entered into your database on July 30, 2002. The pledge was entered incorrectly as $1,000 instead of $10,000. The payment schedule also needs to be rescheduled.

1. From Melissa Elzy's $1,000 pledge gift record with a gift date of July 30, 2002, select the Gift tab. For more information about opening a pledge, see "Accessing a Pledge Gift Record" on page 140.



2. Select **Gift**, **Adjust** from the menu bar. The New Adjustment screen appears.

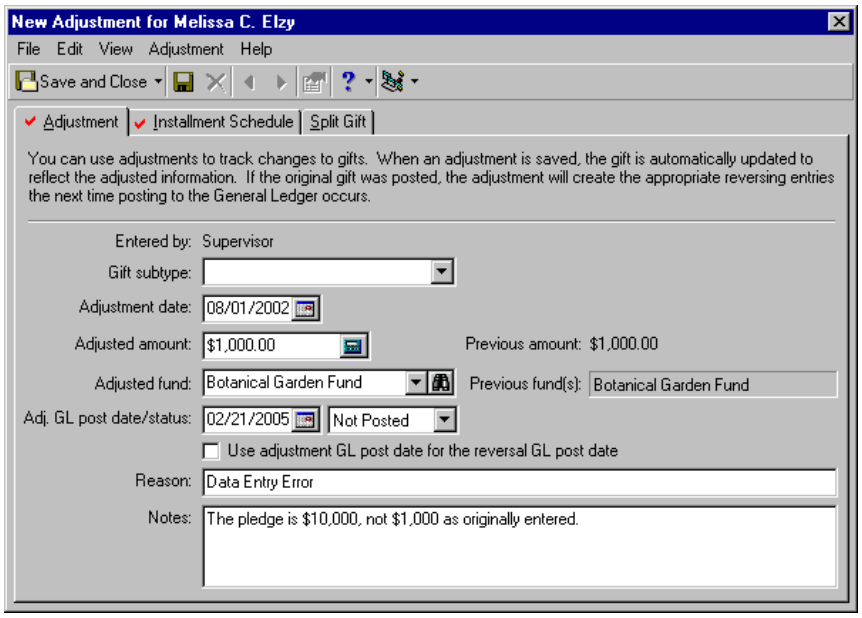


3. In the **Adjustment date** field, the program defaults the date you are adjusting the gift. For this example, it is not necessary to change this date.
4. In the **Adjusted amount** field, enter the amount $10,000. This is the new amount of the pledge. The **Previous amount** displays to the right of the **Adjusted amount** field.
5. In the **Adjusted fund** field, the program defaults the fund from the original **Fund** field on the Gift tab. Because you are not adjusting the fund, it is not necessary to change this information.
6. In the **Adj. GL post date/status** fields, leave today's date and select "Not Posted".

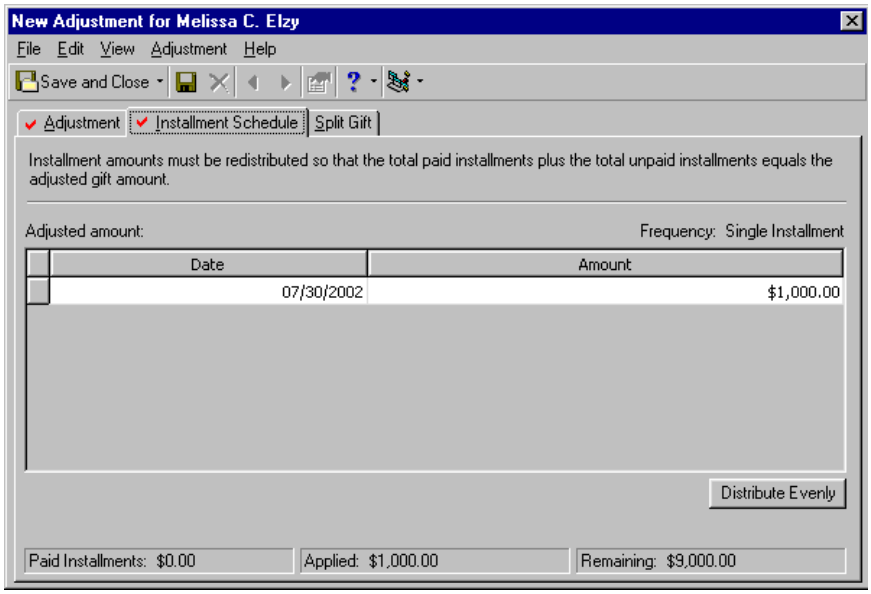
7. Mark the **Use adjustment GL post date for reversal GL post date** checkbox if you want to use the general ledger post date on the adjustment record as the post date for the reversal transaction that is generated when the adjustment is posted to general ledger.

   When marking this checkbox, the general ledger post date for the reversal is the same as the general ledger post date for the adjustment. If this checkbox is not marked, the general ledger post date for the reversal is the general ledger post date on the Miscellaneous tab on the original gift record. For more information about reversals, see "Posting Gifts to Blackbaud's General Ledger" on page 119 and *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits* guide.
8. In the **Reason** box, enter "Data entry error".

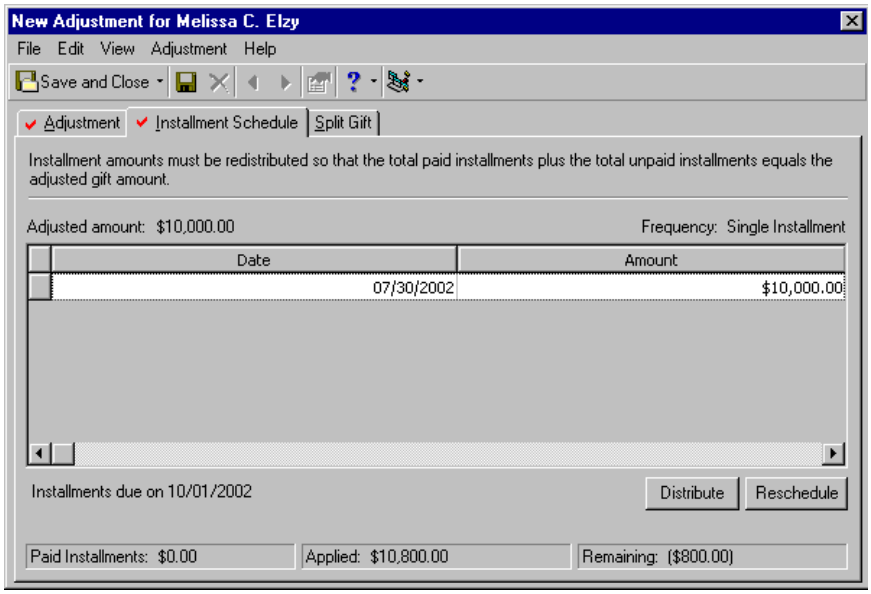
9. In the **Notes** box, enter "The pledge is $10,000, not $1,000 as originally entered."



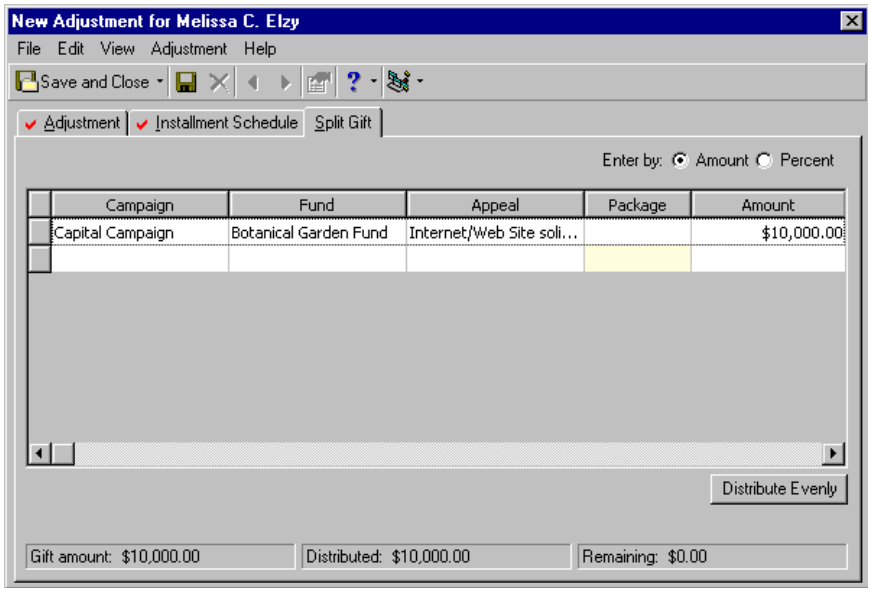
10. Select the Installment Schedule tab.



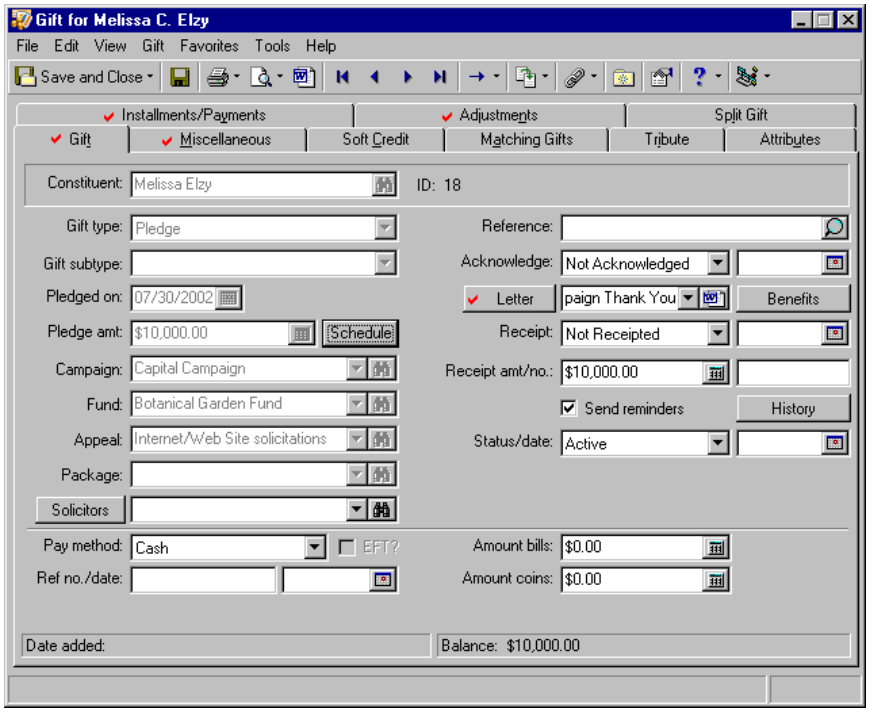
11. In the **Amount** column, replace the entry of $1,000 with $10,000.



12. Select the Split Gift tab. In the **Campaign** column, the program defaults “Capital Campaign” because that is the original campaign to which the gift was designated.
13. The fund you select in the **Fund** field on the Adjustment tab defaults in the first row of the **Fund** column in the Split Gift grid.
14. In the **Appeal** column, the program defaults “Annual Exhibit”, which is the original appeal to which the gift was designated.



15. To save the adjustment for this gift and close the New Adjustment screen, click **Save and Close** on the toolbar. You return to the gift record. The adjusted information is immediately updated on the gift record.



16. To save and close the gift record, click **Save and Close** on the toolbar.

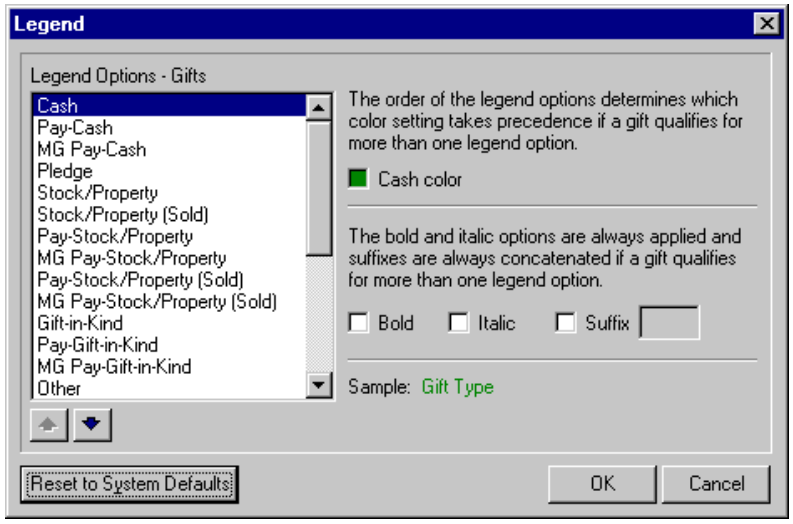
Writing off a Pledge

When a constituent defaults or cannot make payments on a pledge, you can write off the pledge so the balance no longer appears as expected income. Once you write off a pledge, you can change or delete the write-off.

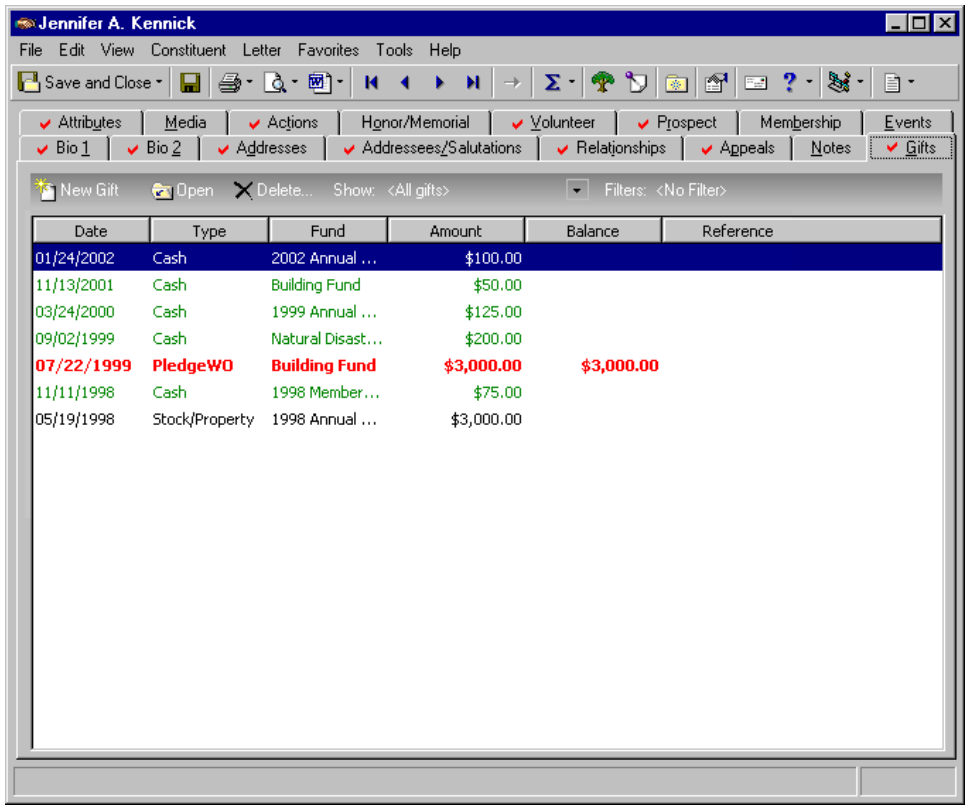
Identifying Pledges With Write-offs from the Gift Tab

Note: For more information about **Legends** and User Options, see the User Options chapter in the *Program Basics Guide*.

To identify a pledge with a write-off, you can select to display the gift in a certain color, bold, italics, or with a suffix in User Options. For example, from the Raiser's Edge **Tools** menu, select **User Options**. Select the Color tab. Select **Legends** in the tree view on the left and click **View Gift Legends**. The Legend screen appears.



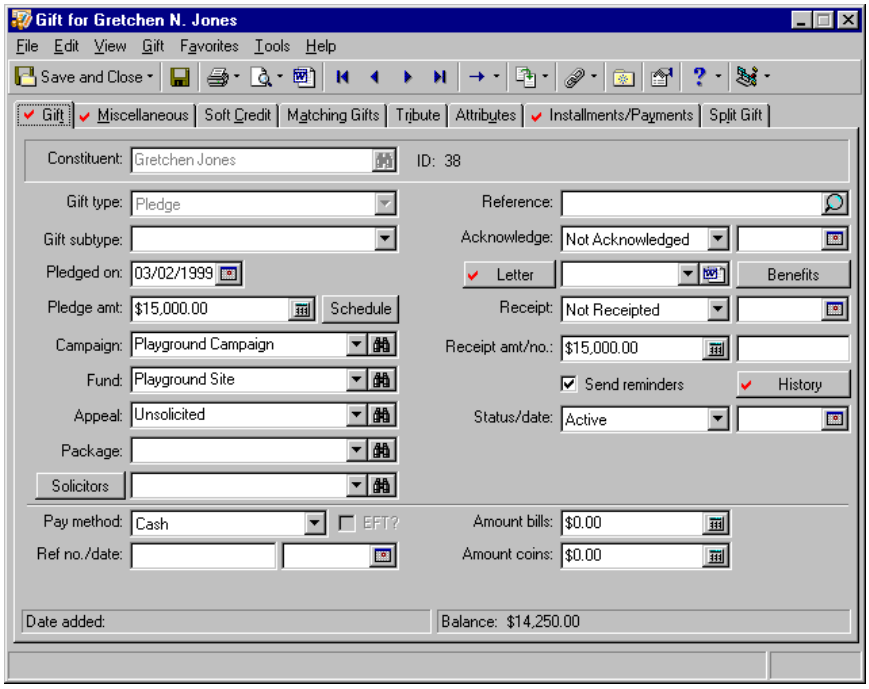
In the **Legend Options-Gifts** box, select **Pledges with write-offs**. Mark the checkboxes you want according to how you want to display pledges with write-offs. Click **OK**. Once you open a constituent record, select the Gift tab to view your results.



Writing off a pledge

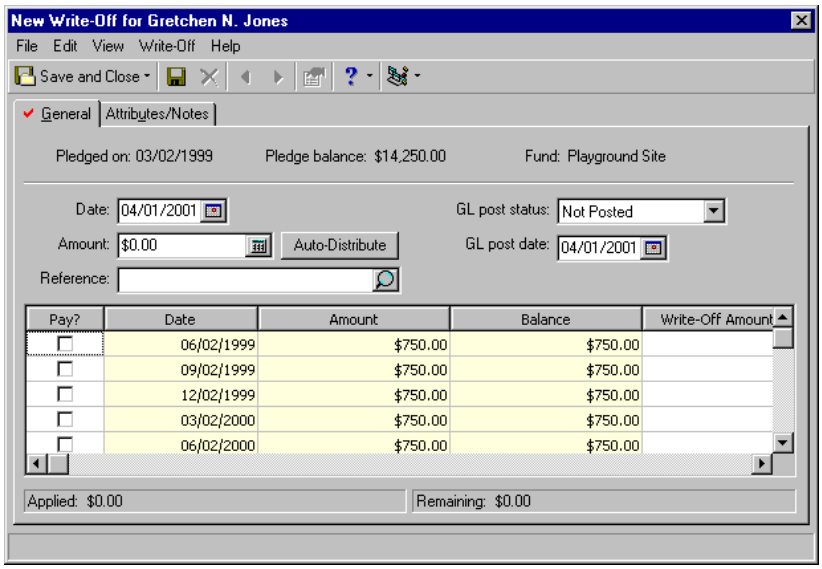
Scenario: In March 1999, Gretchen Jones pledged $15,000 to your organization. She has made one payment for the pledge, but just called to tell you she recently lost her job and is unable to pay the pledge balance. Because the pledge has been outstanding since 1999, you decide to write it off.

1. From Gretchen Jones's pledge dated March 2, 1999, select the Gift tab. For more information about opening a pledge, see "Accessing a Pledge Gift Record" on page 140.



Warning: If you are entering a write off for a Pledge split gift, be aware that the write off split amount is distributed based on the original distribution of the gift on the Pledge Split Gift tab. For example, if you enter a $1000 Pledge split gift, and credit the Building Fund with $600 and credit the remaining $400 to the 2001 Annual Fund, the split is 60%, 40%, respectively. If you write off any of the balance for this Pledge, 60% of the amount goes to the Building Fund and 40% goes to the 2001 Annual Fund.

2. Select **Gift**, **Write Off** from the menu bar. The New Write-Off screen appears.



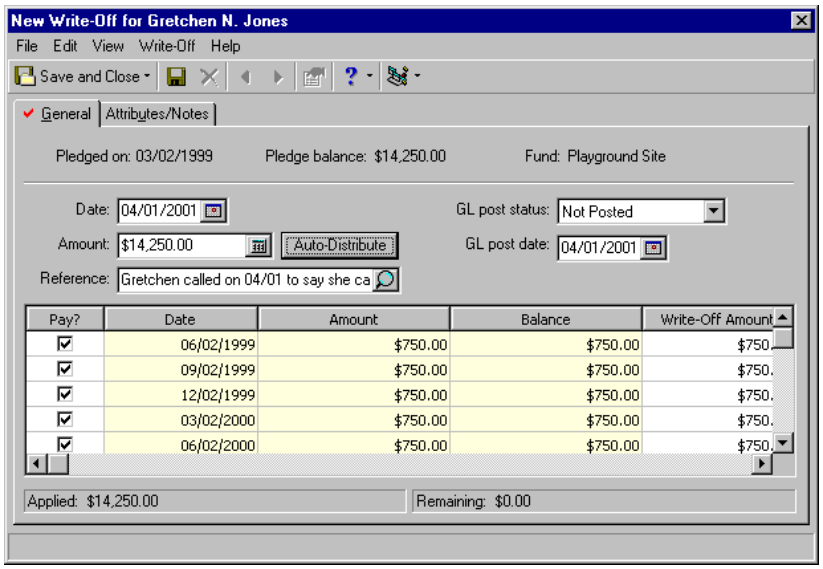
3. In the **Date** field, enter 04/01/2001. This is the date you are writing off the pledge.
4. In the **Amount** field, enter the amount $14,250. You are writing off the entire $14,250 pledge. Notice the original pledge balance displays at the top of the tab.
5. To automatically apply the adjusted amount to outstanding installments, click **Auto-Distribute**.

Note: The **Reference** field on the Write-Off screen is a separate and distinct field from the **Reference** field on the Gift tab of the gift record. The **Reference** field on the Write-Off screen should explain why the amount is being written off. The **Reference** field on the Gift tab should explain that a certain amount was written off.

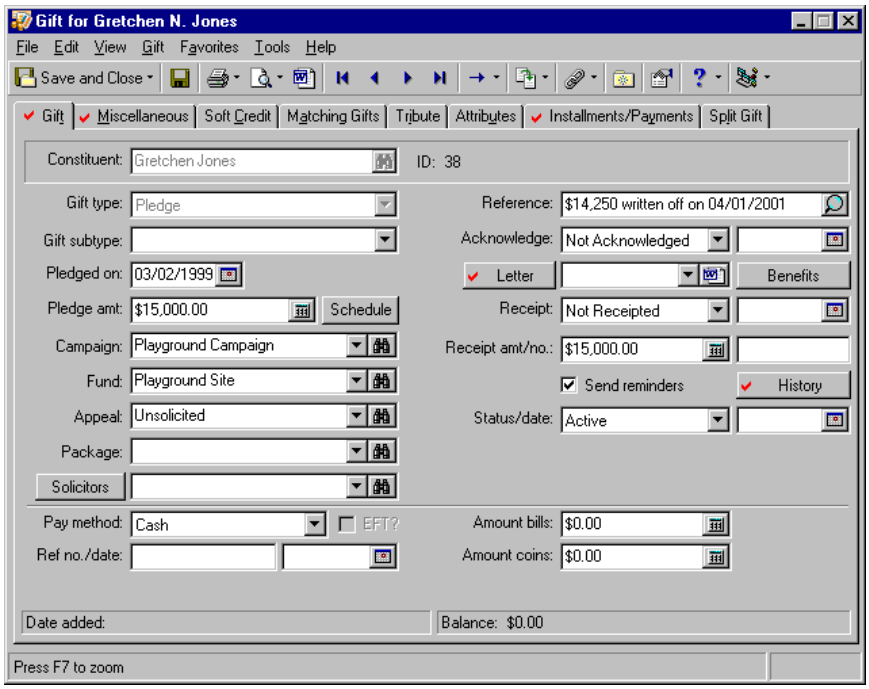
6. In the **Reference** field on the New Write-Off screen, enter “Gretchen called on 04/01 to say she cannot pay this pledge”.
7. In the **GL post status** field, leave “Not Posted”.

   If “Posted” or “Do Not Post” does not appear in the **GL post status** field, you do not have security rights to select these options. If you want to select one of these options, see your Supervisor. For more information about security, see the *Configuration & Security Guide*.

8. In the **GL post date** field, enter 04/01/2001.



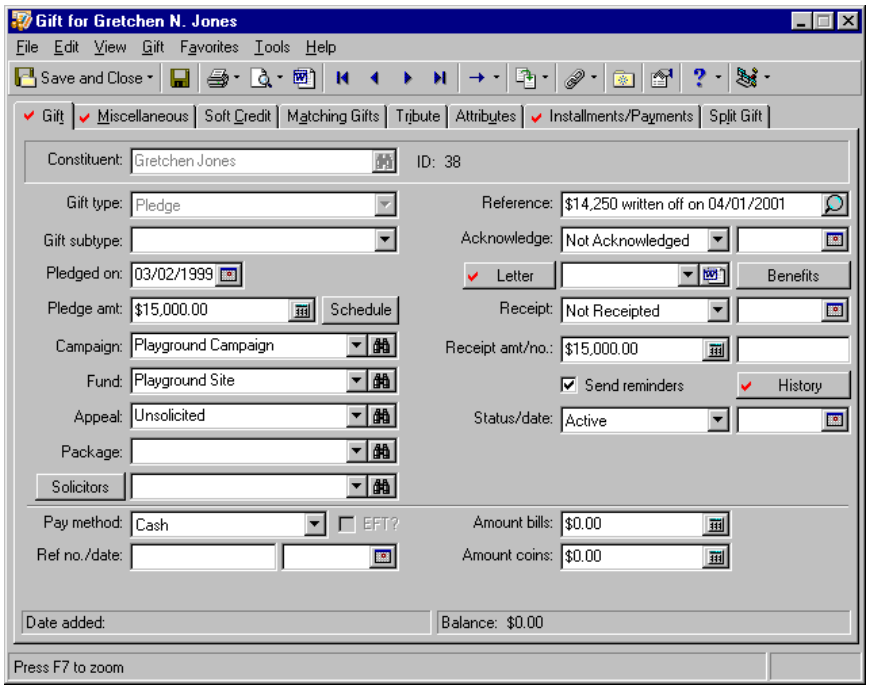
9. Click **Save and Close** on the toolbar. You return to the pledge gift record.
10. On the Gift tab of the pledge gift record, enter "$14,250 written off on 04/01/2001" in the **Reference** field.



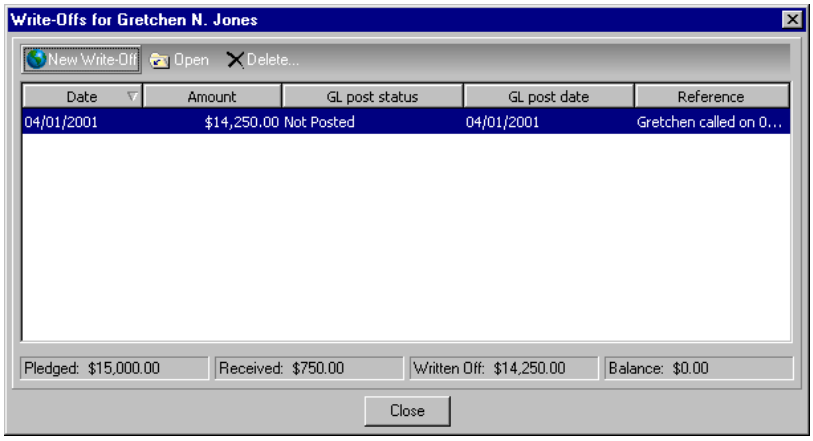
11. To save your changes and close the record, click **Save and Close** on the toolbar.

Editing a pledge write-off

1. Open the gift record for the pledge that has been written off. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.

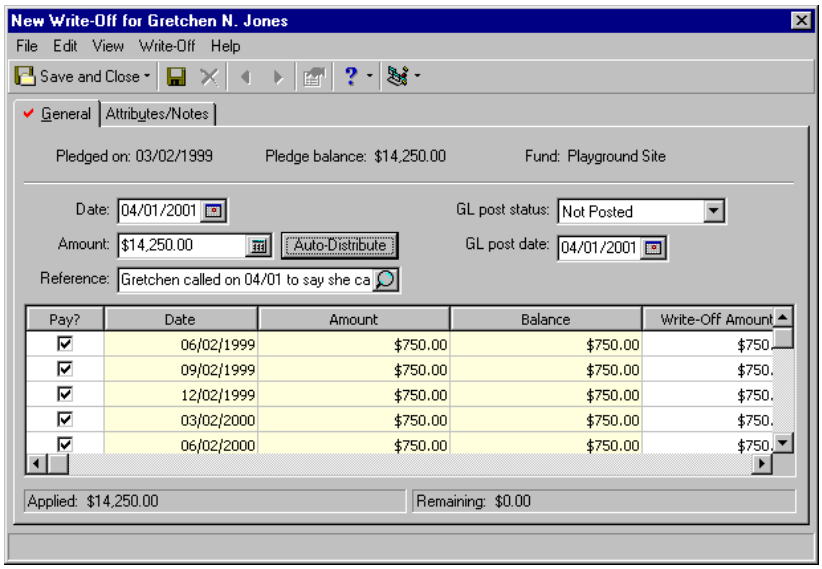


2. From the menu bar, select **Gift**, **View Write-Offs**. The Write-Offs screen appears.

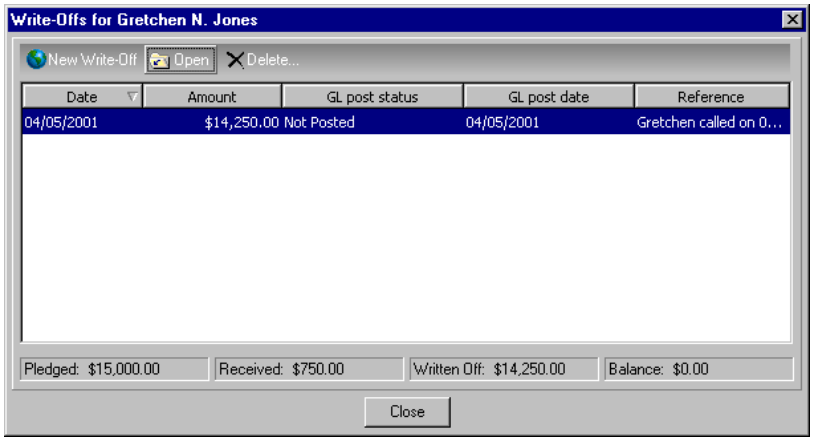


3. In the grid, select the write-off entry you want to edit.

4. Click **Open**. The Write-Offs screen appears.



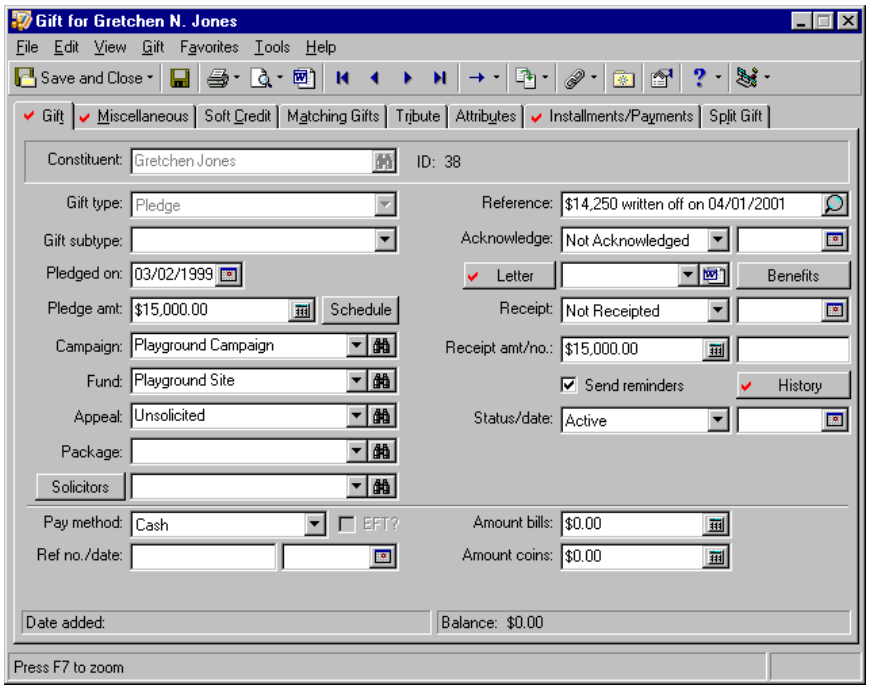
5. In the **Date** field, enter 04/05/2001.
6. In the **GL post date** field, enter 04/05/2001.
7. Click **Save and Close** on the toolbar. You return to the Write-Offs screen.



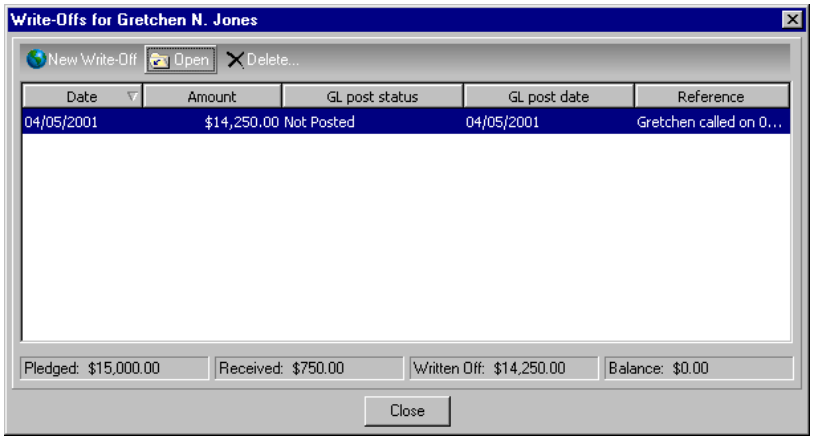
8. Click **Close**. You return to the gift record.
9. Click **Save and Close** on the toolbar to save the changes and close the gift record.

Deleting a pledge write-off

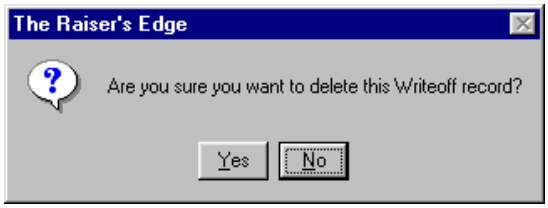
1. Open the gift record for the pledge that has been written off. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.



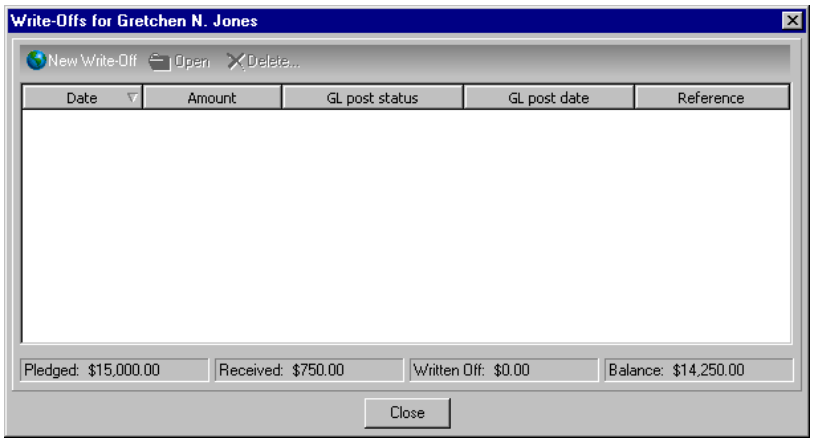
2. From the menu bar, select **Gift**, **View Write-Offs**. The Write-Offs screen appears.



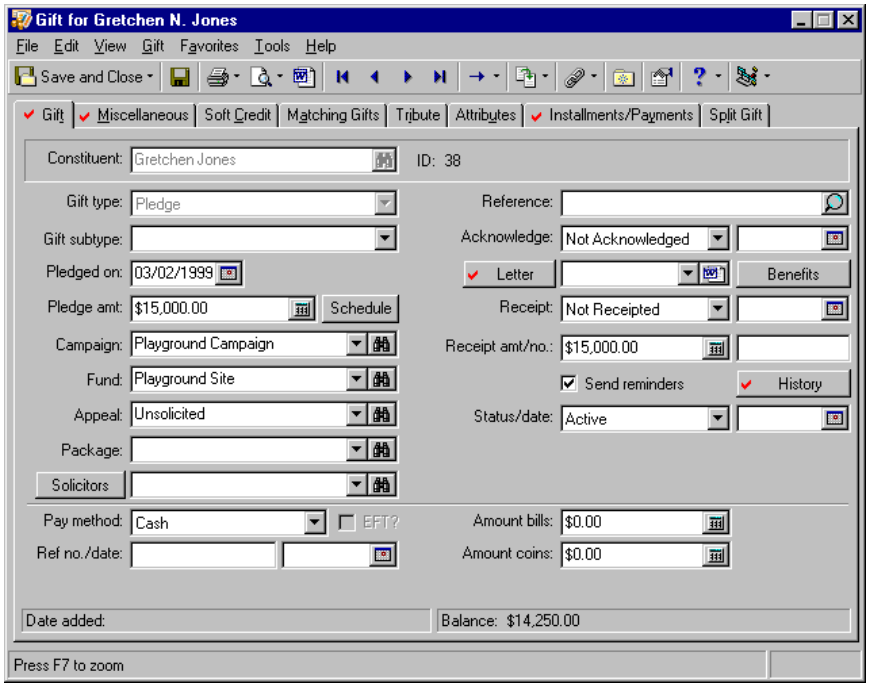
3. In the grid, select the write-off you want to delete.
4. On the action bar, click **Delete**. A message appears.



5. Click **Yes** to delete the write-off and return to the Write-Offs screen.



6. Click **Close**. You return to the gift record. The program updates the Balance display in the status bar to show the new amount due.
7. Remove "$14,250 written off on 04/01/2001" from the **Reference** field.



8. To save the changes and close the gift record, click **Save and Close** on the toolbar.

Globally Writing Off Pledges

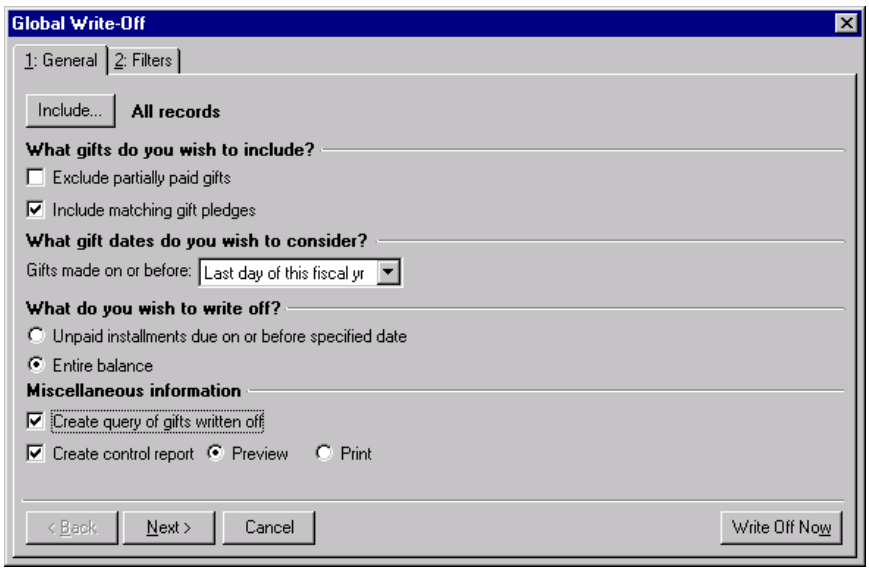
Warning: Before you globally write off pledges in ***The Raiser's Edge***, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

Using the global write off option in ***The Raiser's Edge,*** you can write off a group of pledges without accessing each individual record. If, for example, after a phonathon or some other large fundraising drive, you realize a number of pledges are not going to be paid, you do not have to open each record to write off each pledge. You can simply open **Globally Write Off Pledge**, complete the two parameter tabs, and press one button to reduce the total pledge balance in your database. Any pledge included must have an outstanding balance or be a zero-dollar pledge.

Globally writing off pledges

Scenario: Your organization decides that at the end of its fiscal year, it wants to write off all unpaid and partially paid pledges.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Select **Globally Write Off Pledges**. The Global Write-Off screen appears displaying the General tab.



3. Click **Include** and select the gift records from which you want to write off pledges. You can select one of the following options:
   - **All Records** - The program searches all records looking for all pledges with a balance.

Note: You create gift queries in *Query*. For more information about creating a query, see the Query chapter in the *Query & Export Guide*.

   - **Selected Records** - To use this option, you must have a gift query of the records you want to include in the write-off. When you select this option, the Open Query screen appears, and you can select the query containing the records from which you want pledges written off. If you do not have a query saved, you can create a new query from the Open Query screen.

   For this scenario, select **All records**.
4. In the **What gifts do you wish to include?** frame, select the pledges you want written off. You can mark the following checkboxes:
   - **Exclude partially paid gifts** - The program does not include partially paid pledges even if they still have balances.
   - **Include matching gift pledges** - The program includes matching gift pledges.

   For this scenario, because we want partially paid gifts included, do not mark **Excluded partially paid gifts**. Mark **Include matching gift pledges**.

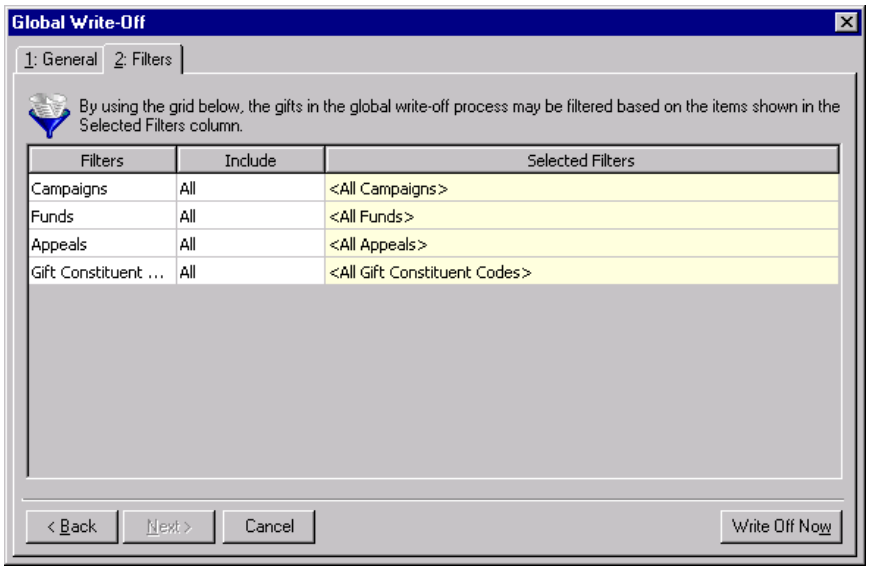
5. In the **What gift dates do you wish to consider?** frame, you can define your write-off further by selecting a gift date. Complete the **Gifts made on or before** field by selecting from the list. If you select "**Specific Date"**, you must complete the **Date field.**

   For this scenario, select "Last day of this fiscal yr".

Warning: Pledges with installments occurring after the **Unpaid installments due on or before <specific date>** entry are not written off. For example, if you select **"Specific Date"** and enter 01/01/2001 and a pledge's last installment is 04/01/2001, the last installment is not removed from your balance.

6. In the **What do you wish to write-off?** frame, you can select one of the following options:
   - **Unpaid installments due on or before <specific date >** - This option depends on the date you selected in the **What gift dates do you wish to consider?** frame. If you select this option, installments due on or before the selected date are written off.
   - **Entire balance** - The program writes off pledges satisfying the date requirement.

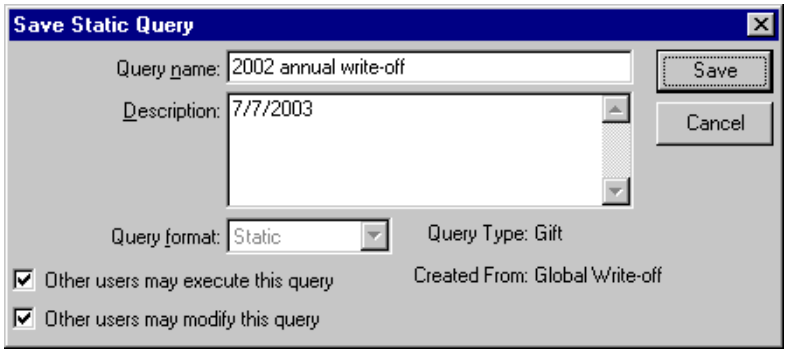
   For this scenario, select **Entire balance**.
7. In the **Miscellaneous information** frame, mark the following checkboxes:
   - **Create query of gifts written off** - The program creates an output query of all gift records written off.
   - **Create control report** - The program generates a report displaying constituent name, gift date, fund, amount, and reference for each gift record written off. You can **Preview** the report on screen or **Print** out a hard copy.
8. Click **Next** to move to the Filters tab. On this tab you select the criteria you want the program to use when filtering pledges to include in the write-off. You can filter pledges based on any of the following: Campaigns, Funds, Appeals, and Gift Constituent Codes.



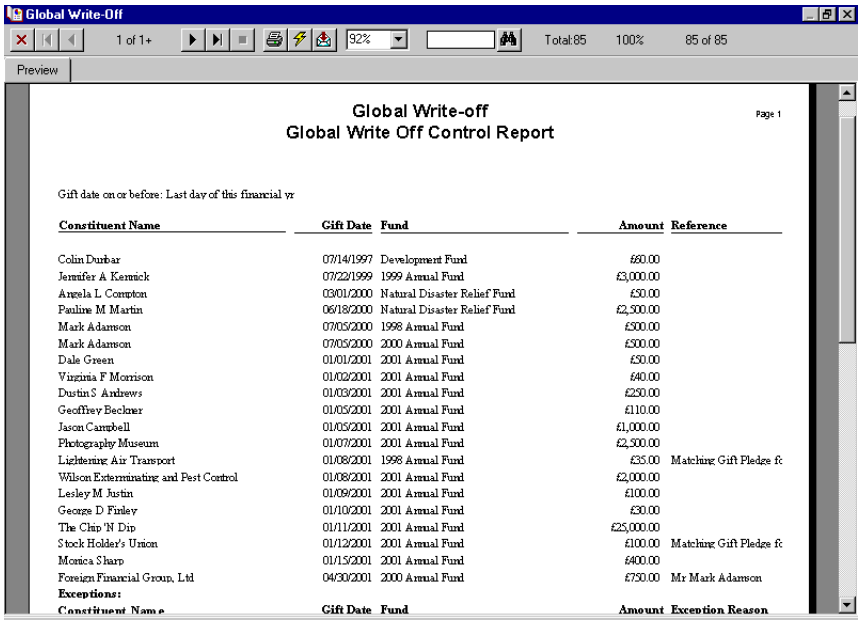
9. In the **Include** column, you can select to include "All" or "Selected" campaigns, funds, appeals, or gift constituent codes. If you choose "Selected", in the **Selected Filters** column, you must enter the campaign, fund, appeal, or gift constituent code you want to include.

   For this scenario, select "All" for all filters.
10. Click **Write Off Now** to write off the pledges.

11. If you marked the **Create query of gifts written off** checkbox in the **Miscellaneous information** frame on the General tab, the Save Static Query screen appears.



12. Enter a **Query name** and **Description**. You can also mark the **Other users may execute this query** or **Other users may modify this query** checkboxes and allow others to work with this query.
13. Click **Save**.
14. A screen appears, tracking the write off process. When the process is complete, if you marked the **Create control report** checkbox in the **Miscellaneous information** frame on the General tab, the report appears.



15. To print the report, click the print icon on the toolbar.
16. To close the report, click the X in the upper right corner. You return to the Administration page.

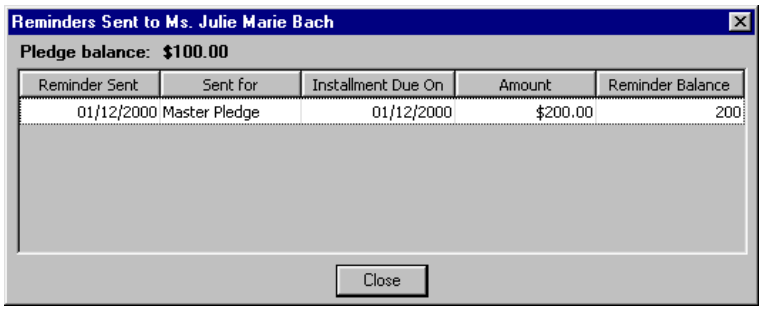
Viewing the Pledge Reminder History

When a pledge gift record is open, you can view a history of pledge reminders sent to the constituent for that pledge. The pledge reminder history lists when the constituent received reminders.

Viewing a pledge reminder history

1. From a pledge gift record, select the Gift tab. For more information about opening a pledge gift record, see “Accessing a Pledge Gift Record” on page 140.

2. Click **History**. The Reminders Sent screen appears.



3. When you finish viewing the reminder history, click **Close**. You return to the pledge gift record.
4. To save the gift and close the record, click **Save and Close** on the toolbar.

Converting Pledges to Recurring Gifts

Note: To convert a single Pledge gift record to a Recurring gift record, open the Pledge gift record. From the **Gift** menu, select **Convert Pledge to Recurring Gift**.

You may find it necessary to convert certain Pledge gifts to Recurring gifts. For example, pledges have an installment schedule with an end payment date and a total amount. Recurring gifts do not. If you had ***The Raiser's Edge 6***, you may have added open-ended gifts to your database as Pledges (because Recurring gifts did not exist). With ***The Raiser's Edge 7***, functionality has improved for this type of gift with the addition of recurring gifts. Use the Converting Pledges to Recurring Gifts facility to convert these gifts to Recurring gifts in ***The Raiser's Edge***.

Before running the Convert Pledges to Recurring Gifts facility, you must create a gift query of records to use for your conversion. By doing this, you can review your query results to make sure you have the correct gifts you want to convert. For more information about *Query*, see the *Query & Export Guide*. For more information about details of the conversion process, see "Converting Pledges to Recurring Gifts" on page 241.

Recurring Gifts

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Note: Certain fields, for example Social Security Number and insurance policy number, are masked and encrypted in the database for security purposes. If you see asterisks in this field, you do not have rights to view the data. For more information, consult with your System Administrator.

When you select Recurring Gift in the **Gift type** field on a gift record, you are creating a template the program uses to generate cash gifts at specified intervals. For example, John Morris gives $20 to your organization every two weeks directly from his paycheck through his company's payroll giving plan. You can create a recurring gift template for this gift so a new gift record can be easily created every two weeks when John donates a new gift.

Recurring gifts are similar to pledges paid in installments because a constituent agrees to donate a specific amount to your organization over time. For both pledges and recurring gifts, you create a separate gift record for the payment and apply the payment to the pledge or recurring gift. Pledges can be paid with any gift type except another pledge. Recurring gifts must be paid with cash gifts. For John Morris's payroll gift, you should create a recurring gift instead of a pledge because John has not set a limit for his gift. Recurring gifts have a benefit over pledges in that you do not need to specify an ending date.

Frequently Used Terms

This section defines words and phrases you need to know as you work with recurring gifts. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Amendment. On a recurring gift record, you can make an amendment to change information on the gift record, such as the recurring gift amount, transaction schedule, split gifts, or solicitor information. Amendments track previous and current information. Therefore, you know when changes occur, the type of change, and the difference in giving when you use an amendment.

EFT. EFT stands for Electronic Funds Transfer and is a general banking system by which transactions, such as deposits or bill payments, are made electronically to the bank.

Electronic payment method. Through *Batch*, if you choose an electronic payment method when using the **Automatically Generate Transactions/Payments** menu option, a constituent's money can be transferred to your organization without using paper or hard currency.

A payment method becomes electronic when you select Direct Debit or Credit Card in the **Pay method** field on a gift record and if you have the optional module *Electronic Funds Transfer* to receive the funds.

Non-electronic payment type. On a gift record, if you choose a non-electronic payment type, a constituent's money must be transferred to your organization using paper, such as a personal or business check, or hard currency. The non-electronic payment types available in ***The Raiser's Edge*** are cash, personal check, business check, and other. Credit card and direct debit payment types are also considered non-electronic if you do not have the optional module *Electronic Funds Transfer* to receive the funds. For more information about *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

Recurring gift template. A recurring gift template is a gift record with the **Gift type** of Recurring Gift. The program uses a recurring gift template to generate gift records with a **Gift type** of Cash following the schedule you specify on the recurring gift template. Recurring gifts cannot be posted to Blackbaud's ***General Ledger*** or receipted because the template does not represent a tangible gift. However, you can post and receipt payments for a recurring gift template.

Status. On a recurring gift template, the status indicates whether the program can create gifts according to the payment schedule you specified. You can select four statuses:

- Active - The recurring gift is active and you can apply payments to the recurring gift template.
- Held - The recurring gift is temporarily inactive and you cannot apply payments toward the recurring gift template. You may want to change a recurring gift's status to "Held" if the donor changes banks and intends to pay any missed payments that occur during the transition.

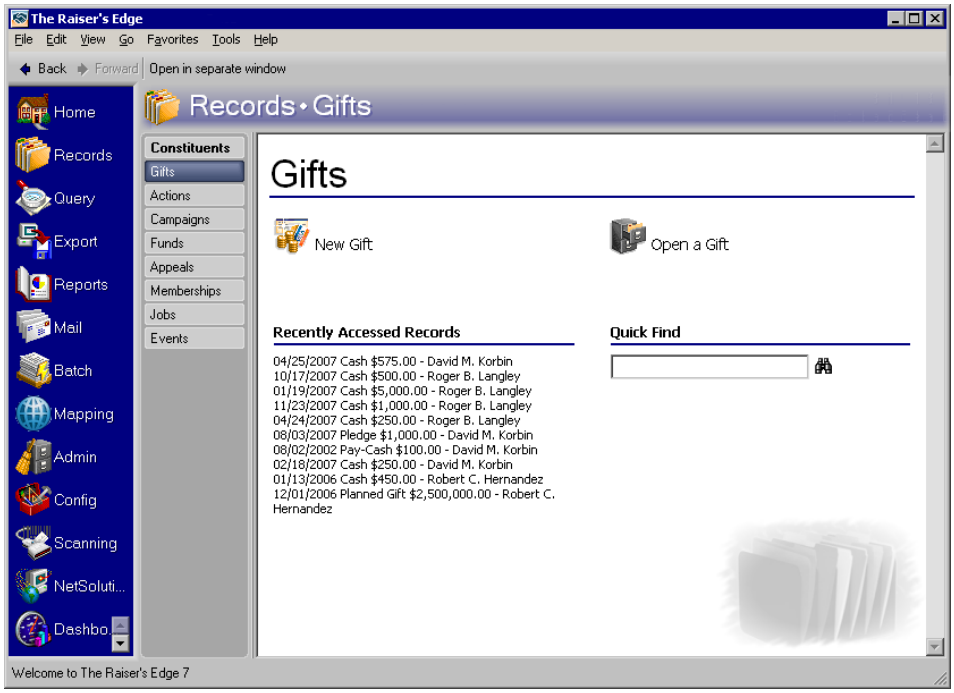
- Terminated - The recurring gift is closed and you cannot apply payments toward the recurring gift template. A Terminated status can have a negative connotation. Typically, a record is terminated if the constituent chooses to stop paying the gift before paying the pledged amount. When a constituent promises to donate a recurring gift every week for the next three years, then calls after a year to tell you he will no longer make donations to your organization, you can change the status for his recurring gift to "Terminated." Once you select Terminated in the **Status** field and save the recurring gift template, you cannot generate recurring gifts from this template again, unless you change the **Status** back to Active.
- Completed - The recurring gift is closed and you cannot apply payments toward the recurring gift template. A Completed status has a more positive connotation. For example, if a constituent promises to donate a recurring gift of $20 every week for a year, you can change the recurring gift's status to Completed when the constituent fulfills the donation and stops sending gifts. Once you select Completed in the **Status** field and save the recurring gift template, you cannot generate recurring gifts from this template again, unless you change the **Status** back to Active.

Transaction. A transaction is a single instance of a recurring gift. For example, if a constituent pledges to donate $30 to your organization every week, a single $30 donation is called a transaction. Each transaction has a separate cash gift record associated with it.

Variance. Variance is the difference between the **Amount** on the Amendment tab on the amendment record and the **Amount** on the Amendment tab of the previous amendment, if more than one amendment exists. If only one amendment exists, it is the difference between the **Amount** on the Amendment tab of the amendment record and the **Amount** on the Gift tab of the of the original recurring gift. Variance is automatically calculated and displays in the **Variance** column on the Amendments tab.

Navigating in Gifts

From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, and Other. After you create a recurring gift template, you can access the template from the Gifts page by following the same methods you use to access other gift records. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** button.

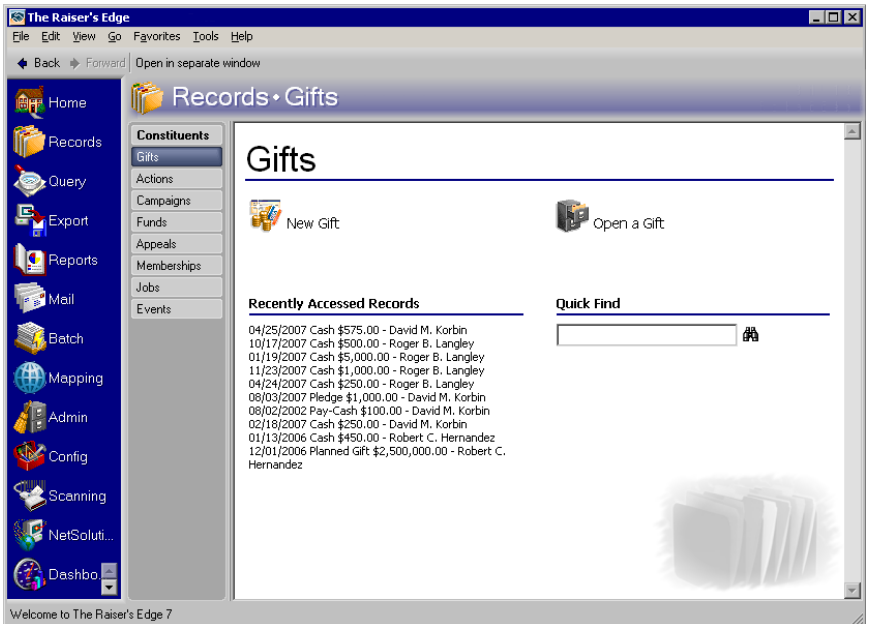


The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

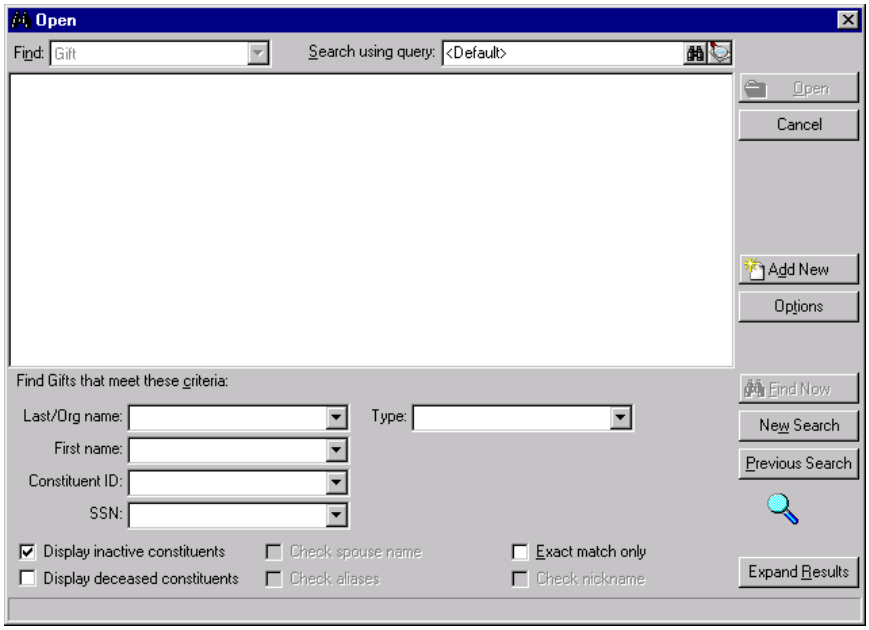
Accessing a Recurring Gift

After you create a recurring gift template, you can open the template from the Records page and from the Gifts tab of the donor's constituent record. This section explains both methods of opening a recurring gift template.

- **Opening an existing recurring gift record from the Records page**
  1. On the Raiser's Edge bar, click **Records**.
  2. Click the **Gifts** button. The Gifts page appears.

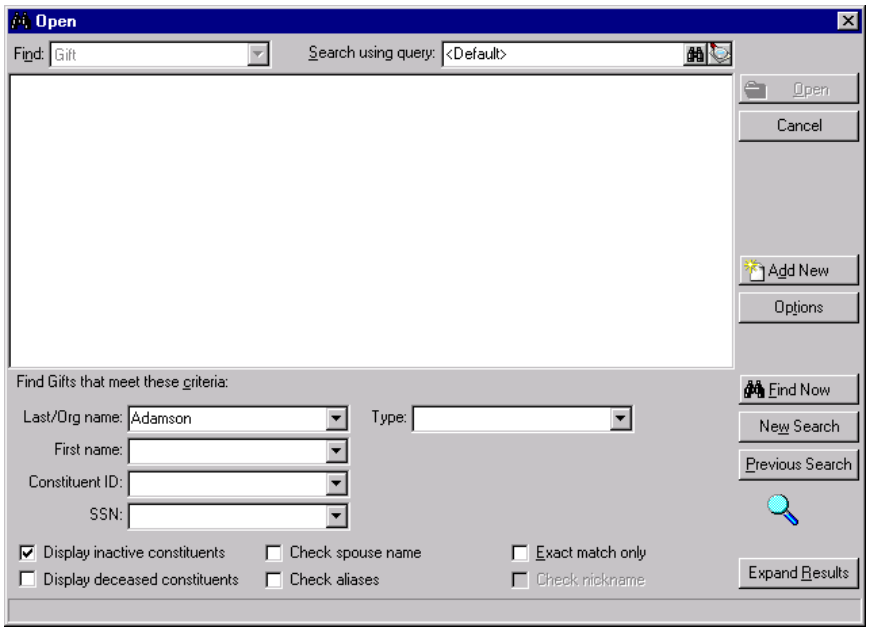


3. Click **Open a Gift**. The Open screen for gifts appears so you can search for the recurring gift template you want to open.



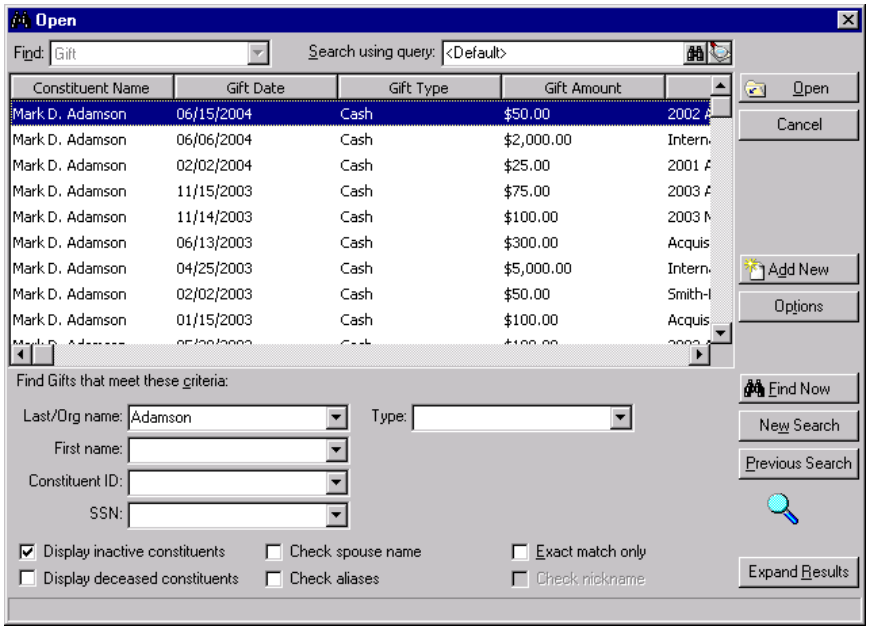
Note: You can enter the first few letters or characters in the criteria fields in **Find Gifts that meet these criteria** frame if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide.*

4. In the **Find Gifts that meet these criteria** frame, decide the criteria you want to use to search for the gift and enter the information in the appropriate fields. You can search by an individual's first or last name, organization name, constituent ID, Social Security Number, and gift type.



Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Adding too much criteria information in the **Find Gifts that meet these criteria** frame can actually prevent you from finding a gift.

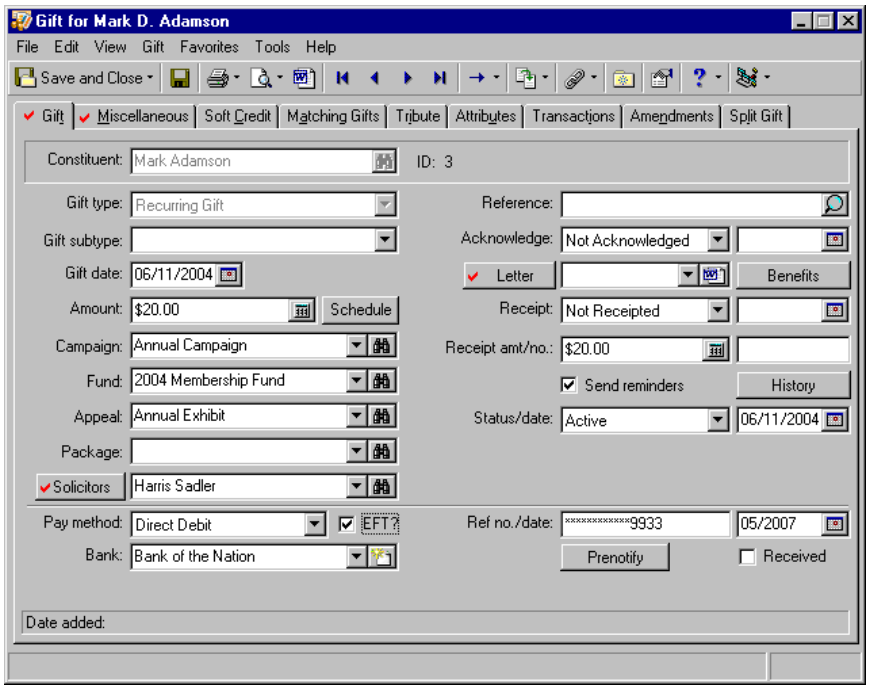
5. Click **Find Now**. If the search criteria you entered match a gift in the database, the gift lists in the grid. More than one gift may appear if the criteria you entered match multiple gifts.



Note: All the fields, checkboxes, and buttons on the Open screen are discussed in detail in the *Program Basics Guide*.

6. In the grid, select the recurring gift template you want to open.

7. Click **Open**. The recurring gift template appears.



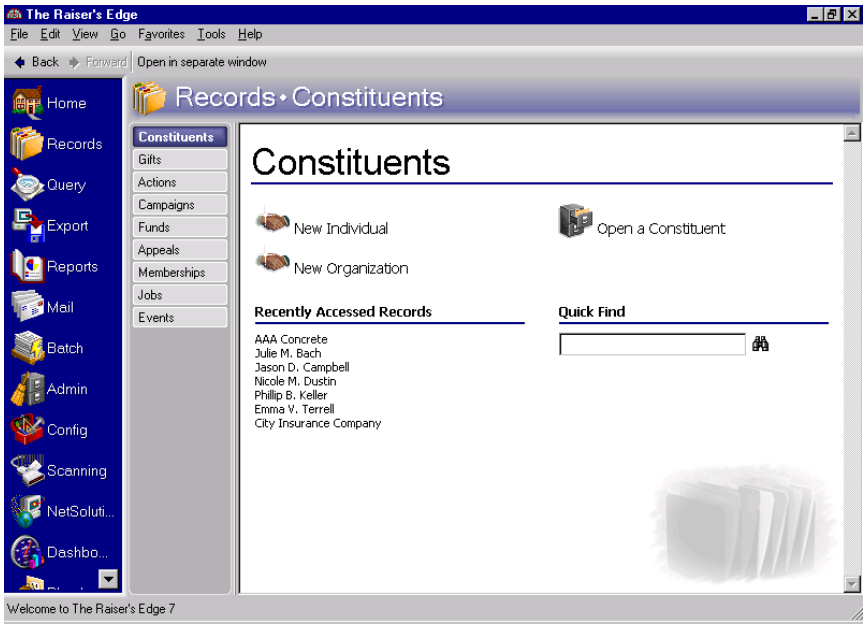
Note: When you amend a recurring gift template, the changes you make also affect any ungenerated past due transactions. For example, you amend a recurring gift template with an unpaid transaction to increase the gift amount from $20 to $30. When you generate the overdue transaction, the program defaults $30 in the **Amount** field. For more information about amendments, see “Amendments tab” on page 220.

8. You can edit or amend any information on the recurring gift template. The changes you make affect only transactions generated after you make the changes.
9. When you finish entering or editing the appropriate information, click **Save and Close** on the toolbar.

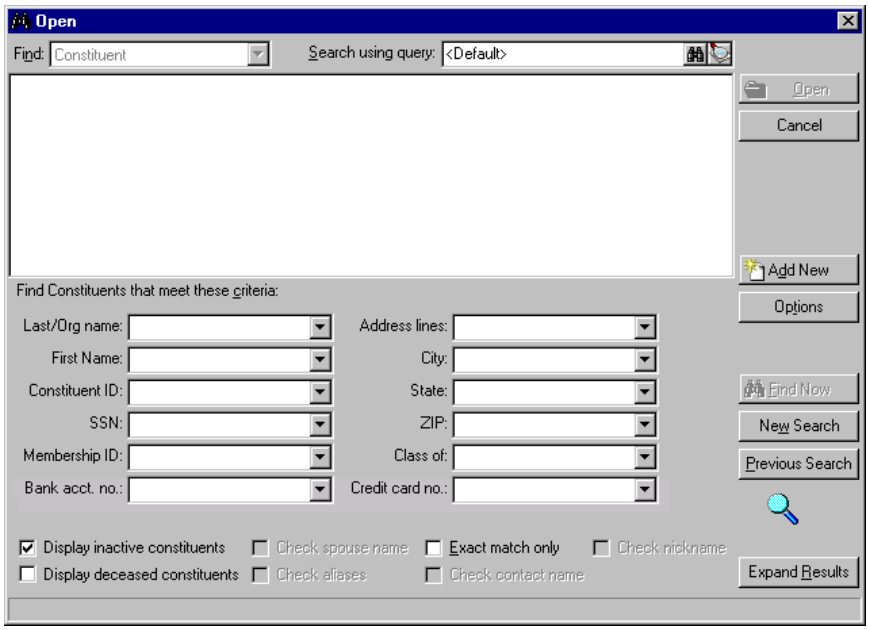
Opening an existing recurring gift template from the Gifts tab of a constituent record

1. On the Raiser’s Edge bar, click **Records**.

2. Click the **Constituents** button. The Constituents page appears.

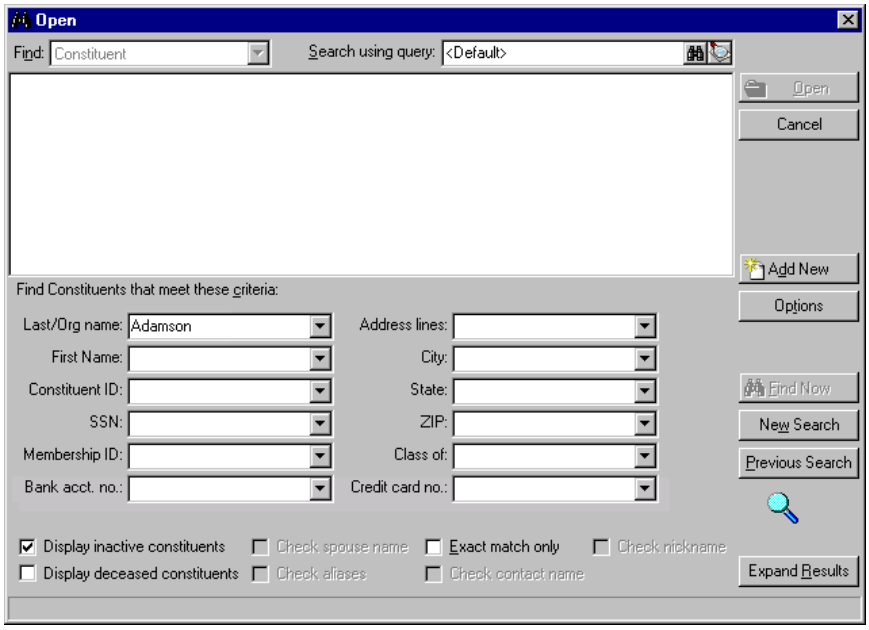


3. Click **Open a Constituent**. The Open screen appears.



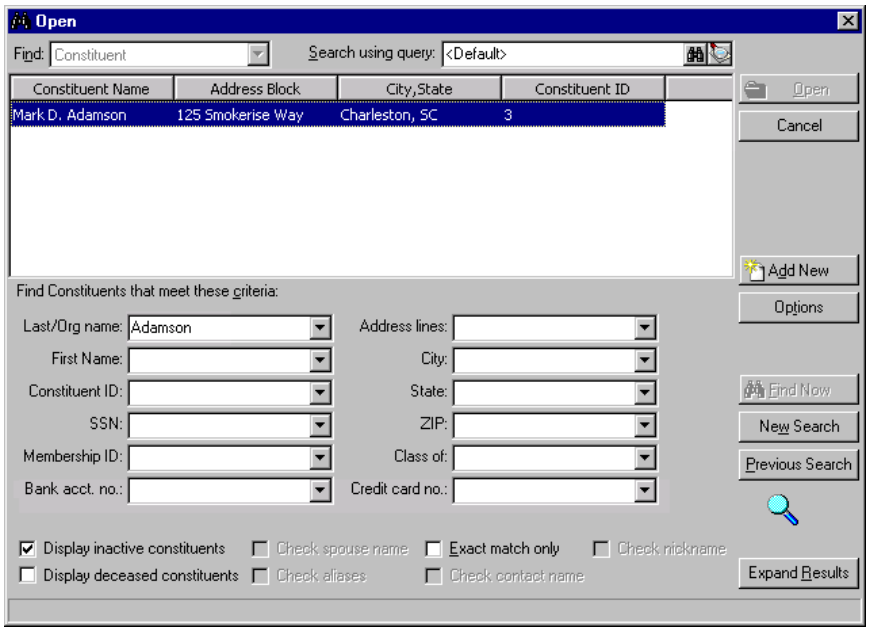
Note: You can enter the first few letters or characters in the criteria fields in **Find Constituents that meet these criteria** frame if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

4. In the **Find Constituents that meet these criteria** frame, decide the criteria you want to use to search for the constituent who donated the gift and enter the information in the appropriate fields. You can search by the constituent's first or last name, Social Security Number, address information, membership ID, bank account number, credit card number, or class of information.



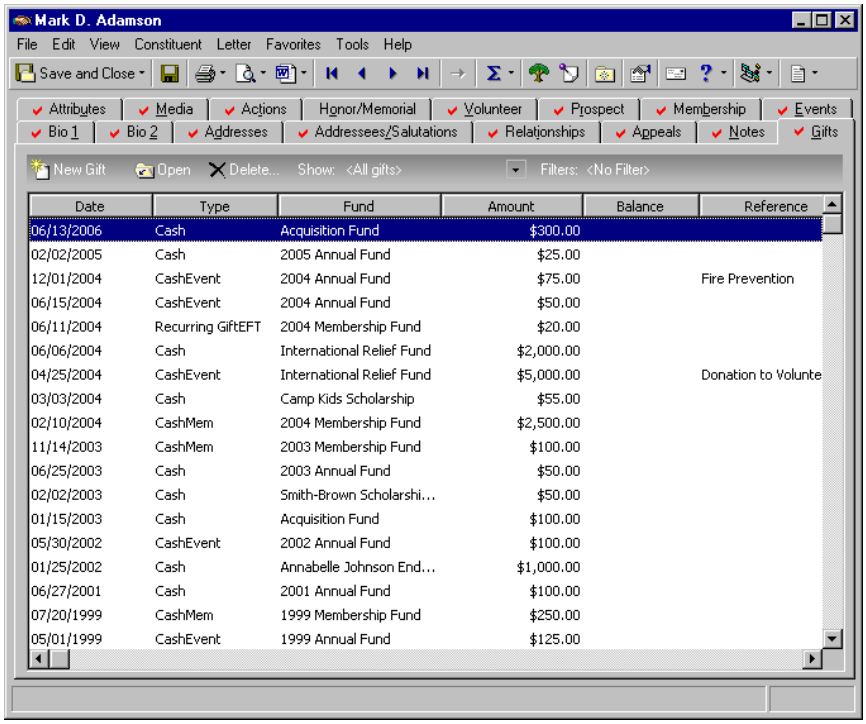
Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** frame can actually prevent you from finding a constituent.

5. Click **Find Now**. If the search criteria you entered match a constituent in the database, the constituent lists in the grid. More than one constituent may appear if the criteria you entered match multiple constituents.

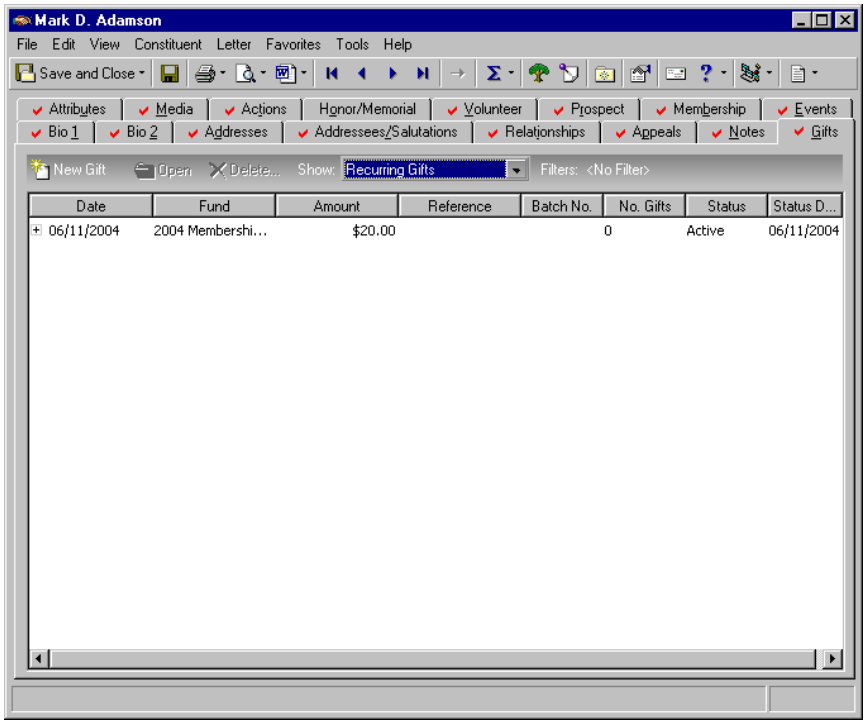


Note: All the fields, checkboxes, and buttons on the Open screen are discussed in detail in the *Program Basics Guide*.

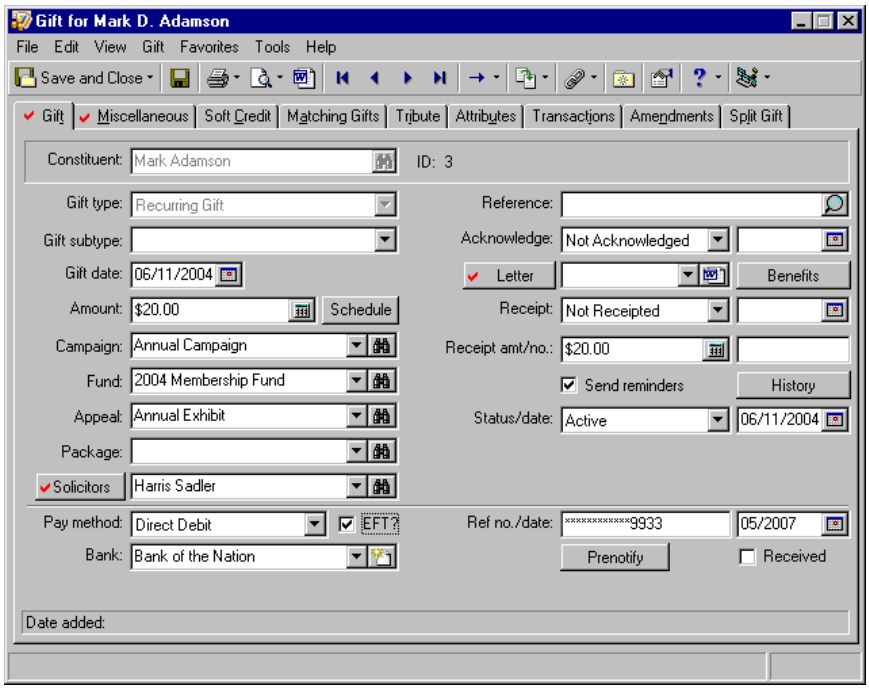
6. In the grid, select the constituent you want to open.
7. Click **Open**. The constituent record appears.
8. Select the Gifts tab.



9. In the **Show** field on the action bar, select “Recurring Gifts”. The grid displays only recurring gift templates.



10. In the Gifts grid, select the recurring gift template you want to open.
11. On the action bar, click **Open**. The recurring gift template appears.



Note: When you edit a recurring gift template, the changes you make also affect any ungenerated past due transactions. For example, you edit a recurring gift template with an unpaid transaction to increase the gift amount from $20 to $30. When you generate the overdue transaction, the program defaults $30 in the **Amount** field.

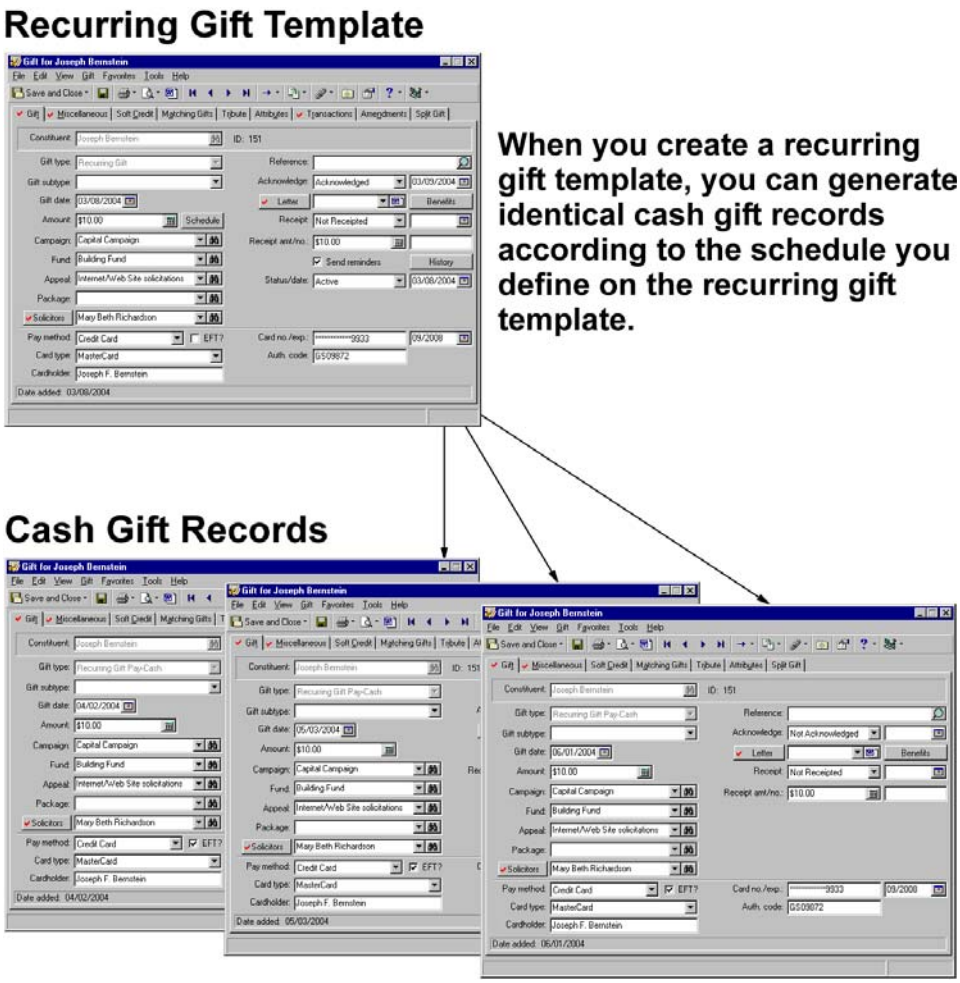
12. You can edit any information on the recurring gift template. The changes you make affect only transactions generated after you make the changes.
13. When you finish editing the recurring gift template, click **Save and Close** on the toolbar. If you do not want to save the changes you made, select **File**, **Close** from the menu bar.

Understanding the Recurring Gift Template

When constituents donate recurring gifts, they give a specific monetary amount repeatedly, according to a schedule. For example, Kim Whitley, a constituent in your database, may choose to donate $40 each week to your organization. Every time you receive a $40 gift from Kim, you need to create a new gift record so you can track the fundraising income for your organization. When a constituent donates a recurring gift, most, if not all the gift records, contain the same information because the constituent donates a specific amount on a recurring basis. To automate the process of creating many similar gift records, you can use a recurring gift template to generate identical copies of a cash gift record according to a schedule. A recurring gift template does not represent an actual donation. However, the cash gift records it generates do represent actual donations to your organization. You cannot post a recurring gift template to the ***General Ledger*** or create a receipt for a recurring gift template because a recurring gift template does not represent an actual gift donated to your organization.

Warning: You cannot post a recurring gift template to ***General Ledger*** or create a receipt for a recurring gift template because it does not represent an actual gift donated to your organization.

A recurring gift template is much like an old fashioned newspaper printing press. To set up a printing press, you select the text you want to appear on the page you are printing. Once you set up the press by arranging the text on the printing plate, you can make many identical copies of the newspaper. In much the same way a printing press prints newspapers, a recurring gift template generates identical gift records for cash gifts. When you set up a recurring gift template, you enter information, including the gift amount; the campaign, fund, appeal, and package to which the gift is attributed; the payment type; attributes; and soft credits. After you set up the template, the program can create cash gift records according to the donation schedule you define on the template. The information you enter on the recurring gift template appears on each cash gift record created from the template.



For example, Dr. Miles Yang decides to donate $25 each month to your organization's Annual Campaign using his credit card. To set up a recurring gift template for Dr. Yang's gift, create a new gift record and select Recurring Gift in the **Gift type** field. As you would for any other gift type, enter gift information, including the campaign, fund, and appeal to which the gift is attributed; the solicitors who receive credit for this gift; and the payment method Dr. Yang is using to donate the gift. After you set up Dr. Yang's recurring gift template, you can generate a cash gift record each month according to the schedule defined on the template. Each time a cash gift record is generated, the program copies the information from Dr. Yang's recurring gift template to a cash gift record. For example, if you select Annual Campaign in the **Campaign** field on the recurring gift template, the program enters Annual Campaign in the **Campaign** field on each cash gift record generated from the template.

Warning: If you make changes to a template with ungenerated past due transactions, the new information on the template defaults on cash gift records generated for the past due transactions.

If Dr. Yang decides to increase his monthly donation to $30 after he makes two payments of $25, you can easily amend the recurring gift template to increase the amount of his monthly gift. Much like the printing press, any changes you make to the recurring gift template only affect transactions generated after you make the change. When you amend Dr. Yang's recurring gift template to increase the gift amount to $30, the program does not change the cash gift records generated for Dr. Yang's past two payments of $25.

The Life of a Recurring Gift

When you set up a recurring gift template in ***The Raiser's Edge***, the program generates cash gift records from the template according to a schedule you define. A recurring gift can last for a specified or unspecified amount of time. For example, a constituent may agree to donate $20 to your organization each month for one year. When the constituent fulfills his donation, the recurring gift is complete and the program will not generate additional transactions from the recurring gift template. If a constituent chooses to donate $10 from his paycheck to your organization until he retires, you can create a recurring gift template that does not have a specified ending date. When the constituent retires and calls to inform you that he is no longer donating gifts from his paycheck, you can edit the recurring gift template so the program does not generate additional transactions.

Note: You can track the reason for a status change in the **Notes** grid on the Miscellaneous tab of the gift record. For more information about the Miscellaneous tab, see "Miscellaneous Tab" on page 54.

The **Status/date** field, located on the Gift tab of a recurring gift template, controls whether you allow the program to generate transactions from the recurring gift template according to the schedule established on the template. The **date** field contains the date of the most recent status change. A recurring gift template must have one of the following statuses: Active, Held, Terminated, or Completed.

Active Status

When a recurring gift template has a status of Active, you can apply or generate transactions for the recurring gift. When you generate transactions from *Batch*, the program checks the schedule you specified on the recurring gift templates to determine whether it is time to generate another cash gift record. If Joe Miller currently donates $15 a week to your organization, you can set up a recurring gift template with a status of Active. When you generate transactions in *Batch*, the program checks the schedule you defined for Joe's gift to determine whether to generate a new cash gift record.

Held Status

Note: You can automatically generate transactions in *Batch* if you have the optional module *Electronic Funds Transfer*. For more information about generating transactions, see "Generating a Recurring Gift Transaction" on page 233.

A recurring gift with a status of Held is temporarily inactive, and you cannot apply or generate transactions for the recurring gift. If a donor calls to tell you he cannot make payments this month because he is changing banks, you may want to change the status to Held if the donor plans to continue giving a recurring gift in the following months.

Terminated Status

Warning: Once you select Terminated or Completed in the **Status/date** field and save the recurring gift template, you cannot generate recurring gifts from the template again, unless you change the **Status** back to Active.

When you change the status of a recurring gift to Terminated, the program disables the recurring gift template, and you cannot apply or generate any further transactions for the recurring gift template. A Terminated status can have a negative connotation. Typically, a recurring gift is terminated if the constituent chooses to stop donating recurring gifts before fulfilling the promised amount. For example, a constituent promises to donate a recurring gift every week for the next three years, then calls after a year to tell you he will no longer make donations to your organization. You can change the status of his recurring gift template to Terminated to indicate the constituent stopped donating gifts before fulfilling the three-year agreement.

Completed Status

When a recurring gift template has the status of Completed, the program disables the recurring gift template, and you cannot apply or generate any further transactions for the recurring gift template, unless you change the **Status** back to Active. A Completed status has a more positive connotation. For example, if a constituent promises to donate a recurring gift of $20 every week for a year, you can change the recurring gift's status to Completed when the constituent fulfills the donation and stops sending gifts.

Tabs on the Recurring Gift Template

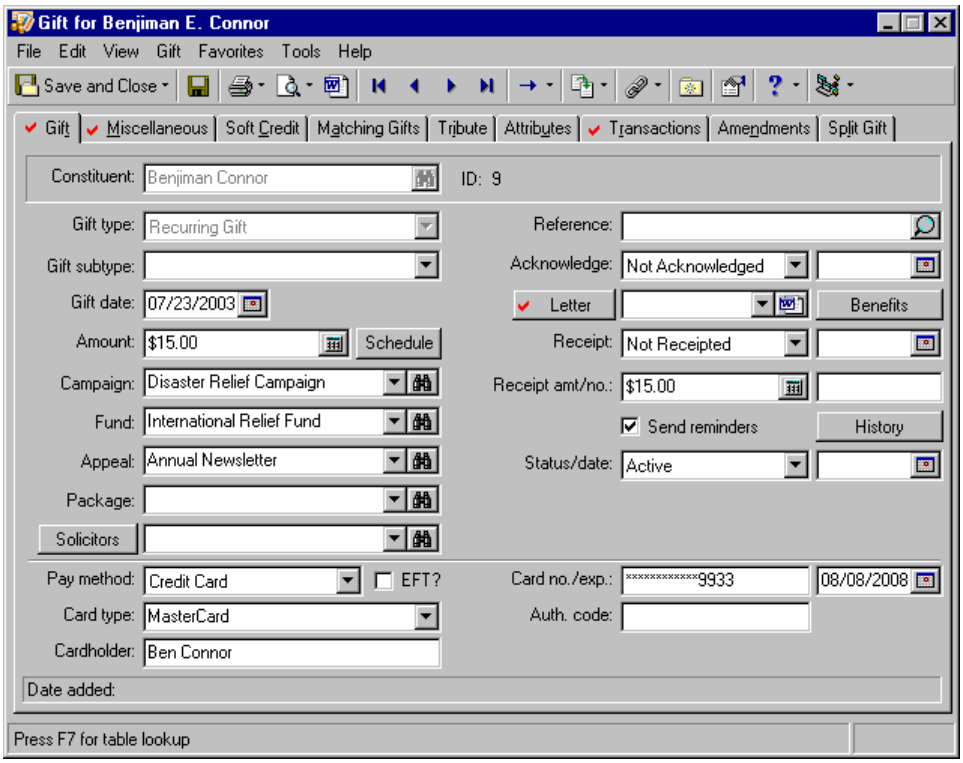
Note: Defaults are guidelines you set up to simplify data entry. When the program enters a default in a field, you can change it by selecting the text and typing over it with the correct entry.

To set up a recurring gift template, create a new gift record and select Recurring Gift in the **Gift type** field. Any information you enter on the template appears as a default on each cash gift record generated from the template. For example, if you credit Joan Smith as the solicitor on the template, Joan Smith receives credit for each cash gift record you generate from the template.

This section explains each tab on the recurring gift record and explains how the program copies the information you enter on these tabs as defaults for cash gift records generated from the template. For a complete explanation of the tabs and options available on a gift record, see "Understanding the Tabs on a Gift Record" on page 25.

Gift Tab

When you select Recurring Gift in the **Gift type** field on the Gift tab, the program adds the **Send reminders** checkbox, **History** button, and **Status/date** field below the **Receipt amt/no.** fields.



You can enter data in most of the fields on the Gift tab of the recurring gift template the same way you do for other gift types. For more information about the Gift tab, see “Gift Tab” on page 25.The next sections explain the fields on the Gift tab that have specific significance on the recurring gift template.

Entering the Recurring Gift Date and Amount

Note: To calculate the recurring amount, you can click the calculator in the **Amount** field. After you calculate the recurring amount, click **Paste** on the calculator, and the program displays the calculated value in the **Amount** field.

In the **Gift date** field, enter the date the constituent agreed to donate the recurring gift. When you generate cash gift records from the template, the program automatically defaults the transaction date in the **Gift date** field on the cash gift record. For example, on March 7, Jerome Wilson agrees to donate $20 to your organization on the first day of every month. On the recurring gift template, enter the date 03/07/2000 in the **Gift date** field to record the date Jerome agrees to donate the gift. When you generate the first cash gift record on April 1, the program automatically enters the date 04/01/2000 in the **Gift date** field on the cash gift record.

In the **Amount** field, enter the amount the constituent wants to pay at each recurring interval. For example, if a constituent wants to donate $20 each month, enter $20 in the **Amount** field.

Acknowledging a Recurring Gift

You can acknowledge a recurring gift in several ways. You can acknowledge the recurring gift when the constituent agrees to donate the gift, you can acknowledge the recurring gift every time the constituent makes a recurring donation, or you can acknowledge the recurring gift according to a schedule you choose. The **Acknowledge** field is one of the only fields on the Gift tab of a recurring gift template that does not default to the cash gift records generated from the template. Your selection in the **Acknowledge** field does not default because you may want to acknowledge a recurring gift at the time the constituent agrees to donate a recurring gift, or you may want to acknowledge a recurring gift each time you receive a transaction.

The **Acknowledge** field on the recurring gift template defaults to Not Acknowledged. If you decide to acknowledge the recurring gift when the constituent agrees to donate the gift, you can automatically default Acknowledged in this field. This can be done by generating a single letter from the Microsoft *Word* icon in the **Letter** field on the gift record or by using the Donor Acknowledgement mail task in *Mail*. For more information about creating a letter from the gift record, see “Creating an Acknowledgement Letter from a Gift Record” on page 101. For more information about using the Donor Acknowledgement Letters mail task, see the *Mail Guide*.

When you generate cash gift records from the recurring gift template, the program defaults Not Acknowledged in the **Acknowledge** field. On each cash gift record, you also need to select whether you want to acknowledge the specific recurring gift transaction by selecting Acknowledged, Not Acknowledged, or Do Not Acknowledge and entering a reference date.

Receipting a Recurring Gift

Note: Each cash gift record generated from the recurring gift template must be receipted separately. However, if the constituent wants to receive only one receipt, you can combine all the gifts on one receipt by selecting **Consolidated receipts** in the **Receipt type** field on the Bio 2 tab of the constituent record.

Because a recurring gift template does not represent an actual gift, you need to record the receipt status on each cash gift record generated from the recurring gift template. The program defaults your entry in the **Receipt** field on the recurring gift template to each cash gift record generated from the template. For example, if you create a recurring gift template for a constituent who does not want to receive receipts for his gifts, select Do Not Receipt in the **Receipt** field on the template. The program defaults Do Not Receipt in the **Receipt** field on each cash gift record generated from the recurring gift template.

If you use *Mail* to create gift receipts, select Not Receipted in the **Receipt** field on the template and do not enter a reference date. The program defaults Not Receipted in the **Receipt** field on each cash gift record. After you create receipts in *Mail*, the program automatically updates the **Receipt** field to Receipted and adds the date you printed the receipts on the cash gift record. For more information about generating receipts in *Mail*, see the *Mail Guide*.

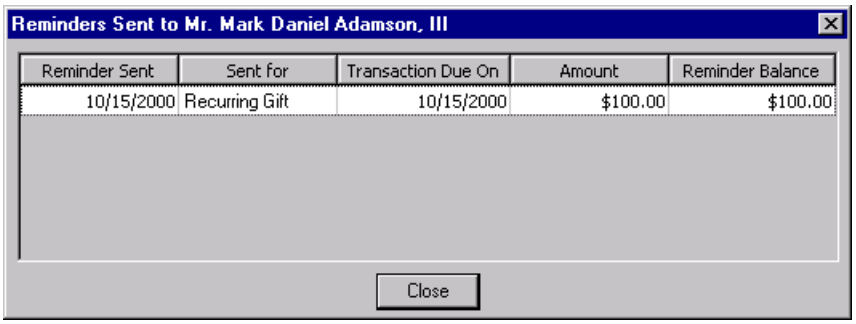
Sending Recurring Gift Reminders

To increase the number of constituents who pay their recurring gifts, you may want to send donors a reminder of the commitment they have made. In *Mail*, you can use the Reminders mail task to print recurring gift reminders on several types of forms you can order from Blackbaud. If you do not want to use these forms, you can use the mail task to export data to the application where you created a custom form. For a donor to receive a recurring gift reminder using the Reminders mail task, you must mark the **Send reminders** checkbox on the gift record.

Note: If you are scheduling a new recurring gift, the Reminders Sent screen is blank because you have not sent any reminders to the constituent for this recurring gift.

When creating recurring gift reminders, you can choose to send either a single reminder for the entire recurring gift or a reminder each time an installment is due. For more information about sending recurring gift reminders using *Mail*, see the Reminders chapter of the *Mail Guide*.

The **History** button appears beside the **Send reminders** checkbox. When you click the **History** button, the Reminders Sent screen appears so you can view all reminders sent to the constituent for the recurring gift.



If you choose to send reminders to a donor, the program tracks the information about each reminder you send. This information includes the date you print the reminders in *Mail*, due date for the recurring gift or recurring installment, amount due, and remaining amount due on the recurring gift at the time you sent the reminder.

Selecting the Status of a Recurring Gift

The main function of the **Status/date** field is to determine whether you can apply or generate gifts from the recurring gift template and to track the date of the most recent status change. A recurring gift template can have a status of Active, Held, Terminated, or Completed. When a recurring gift template has the status of Active, the program can generate cash gift records from the template according to the schedule you establish on the Transactions tab. If a recurring gift template has a status of Held, Terminated, or Completed, the program cannot generate cash gift records. For a detailed explanation of each status, see “The Life of a Recurring Gift” on page 207

Entering the Payment Method for a Recurring Gift

Note: All payment methods are available on a Recurring gift record.

The payment method is a very important part of the recurring gift template because the method a constituent uses to donate a gift affects the options available to generate transactions from the recurring gift template.

A constituent can transfer a cash gift to your organization in two ways: electronically and non-electronically. If a constituent uses a non-electronic payment type, such as Personal or Business Check, your organization receives the gift when you deposit the donor’s check in the bank. For gifts with electronic payment types, such as a credit card or direct debit, you must authorize the transaction with the donor’s bank or a credit card authorization company before you receive the gift.

Warning: To generate transmission files for credit cards, you must select either ICVerify or IATS/Other in the **Process credit cards through** field in *Configuration*. This field is located on the Business Rules page under **Batch options**. For more information see the *Electronic Funds Transfer (EFT) Guide*.

If you have the optional module *Electronic Funds Transfer*, you can create transmission files directly from ***The Raiser’s Edge*** for credit card and direct debit gifts. A transmission file contains information necessary to authorize a credit card or direct debit transaction. Once you create a transmission file, you can send the file to the donor’s bank to approve the transaction, or to *ICVerify* or an authorization service such as *Blackbaud Merchant Services* or IATS for processing.

To process electronic credit card and direct debit gifts using *Electronic Funds Transfer*, you must create the gift record for the electronic gift using *Batch*. If a constituent is making a pledge or recurring gift, you can create a gift record for the pledge or recurring gift using any method. In the **Pay method** field on this gift record, select Credit Card or Direct Debit. When you select either entry, the **EFT** checkbox appears to the right of the **Pay method** field. Mark the **EFT** checkbox to indicate you want to process the gift if you have the optional module *Electronic Funds Transfer*.

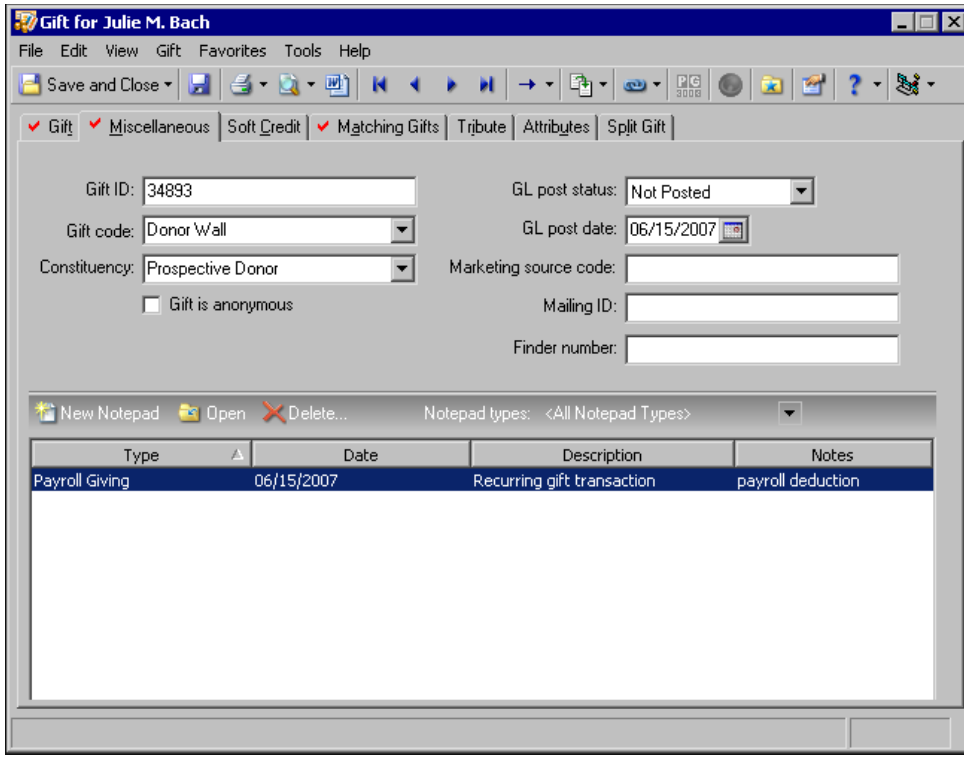
To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you leave the modified row in the batch. Depending on your Internet connection, you may experience a slight delay. In your database, ***The Raiser's Edge*** stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record and in the batch, the **Credit Card No.** displays a masked credit card number, with only the last four digits visible.

The Raiser's Edge requires Internet access to connect to the Blackbaud *Payment Service*. If ***The Raiser's Edge*** cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the batch without saving.

For more information about processing gifts using *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

Miscellaneous Tab

All your entries in the fields on the Miscellaneous tab appear as defaults on cash gift records generated from the recurring gift template. For example, if you add a note in the **Note** grid on the recurring gift template, the program adds the note to every cash gift record generated from the template. If the note does not apply to a particular cash gift record, you can delete the note from the cash gift record without deleting the note from the recurring gift template.



For complete details about the Miscellaneous tab, see "Miscellaneous Tab" on page 54.

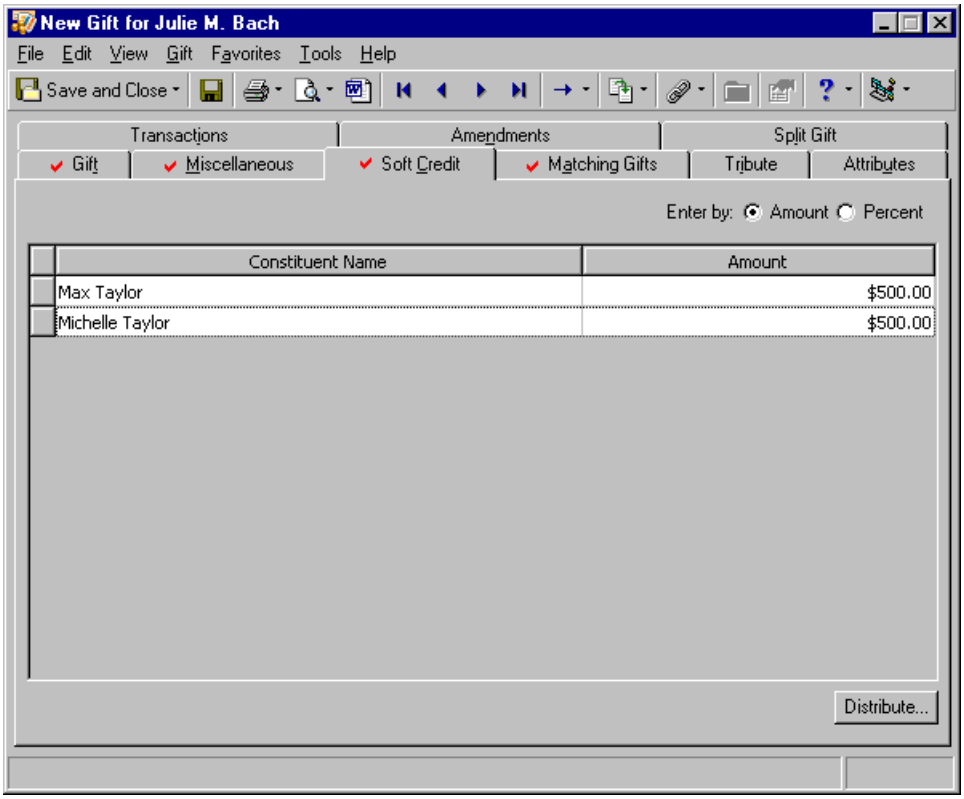
Posting a Recurring Gift to the General Ledger

Warning: Each cash gift record generated from the recurring gift template must be individually posted to the ***General Ledger***. We recommend you do not enter a default in the **GL post date** field because each cash gift record may be posted on a different date.

Because a recurring gift template is not associated with an actual gift, you cannot post it to the ***General Ledger***. Instead, you need to post each cash gift record generated from the recurring gift template to the ***General Ledger*** separately. The program defaults the Not Posted and Do Not Post entries in the **GL post status** and **GL post date** fields on the recurring gift template to each cash gift record, generated from the template. For example, if you create a recurring gift template for a constituent who donates weekly gifts of $10, select Not Posted in the **GL post status** field on the template. The program defaults Not Posted in the **GL post status** field for each cash gift record generated from the recurring gift template. If you use the **Post to GL** option in *Administration*, the **GL post status** automatically changes to Posted and the date you post the gift appears in the **GL post date** field.

Soft Credit Tab

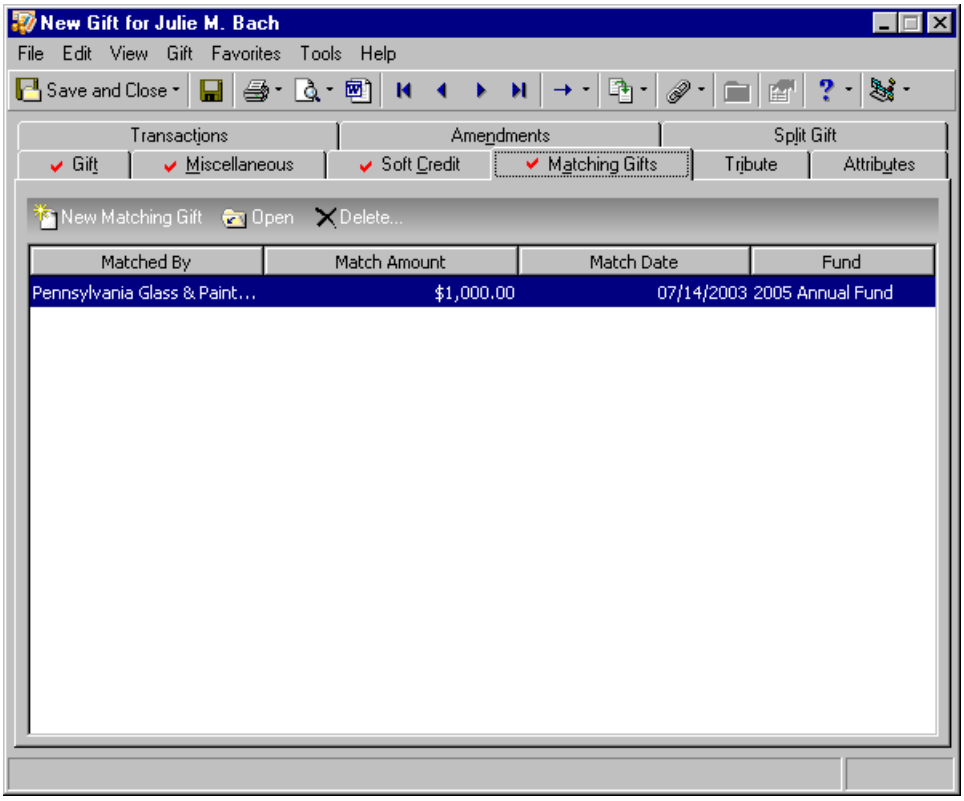
A soft credit allows more than one constituent to *share* credit for a single gift. When you soft credit constituents for a gift, you can decide whether to split the credit evenly among all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution. You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in the database.



When you add soft credit recipients on the Soft Credit tab of a recurring gift template, the program defaults the soft credit recipients to the Soft Credit tab of each cash gift record generated from the template. For example, when Julie Bach donates a recurring gift of $1000 to your organization, she wants her aunt and uncle, Michelle and Max Taylor, to each receive a soft credit of $500. You can add the soft credit for Michelle and Max Taylor on the Soft Credit tab of the recurring gift template. When you create cash gift records from the template, the program soft credits Michelle and Max Taylor on the Soft Credit tab of each cash gift record. For more information about adding soft credit recipients, see “Soft Credit Tab” on page 58.

Matching Gifts Tab

Sometimes, companies match gifts donated to nonprofit organizations by their employees or corporate partners. For example, Winston Tate, a Toy World employee, donates a recurring gift of $10 to your organization directly from his paycheck as a part of Toy World's payroll giving program. As part of the payroll giving program, Toy World matches employee gifts on a one-to-one ratio when gifts meet certain criteria. Because Toy World matches gifts donated by their employees, you receive an additional $10 gift from Toy World if Winston Tate's gift meets the criteria set by Toy World.

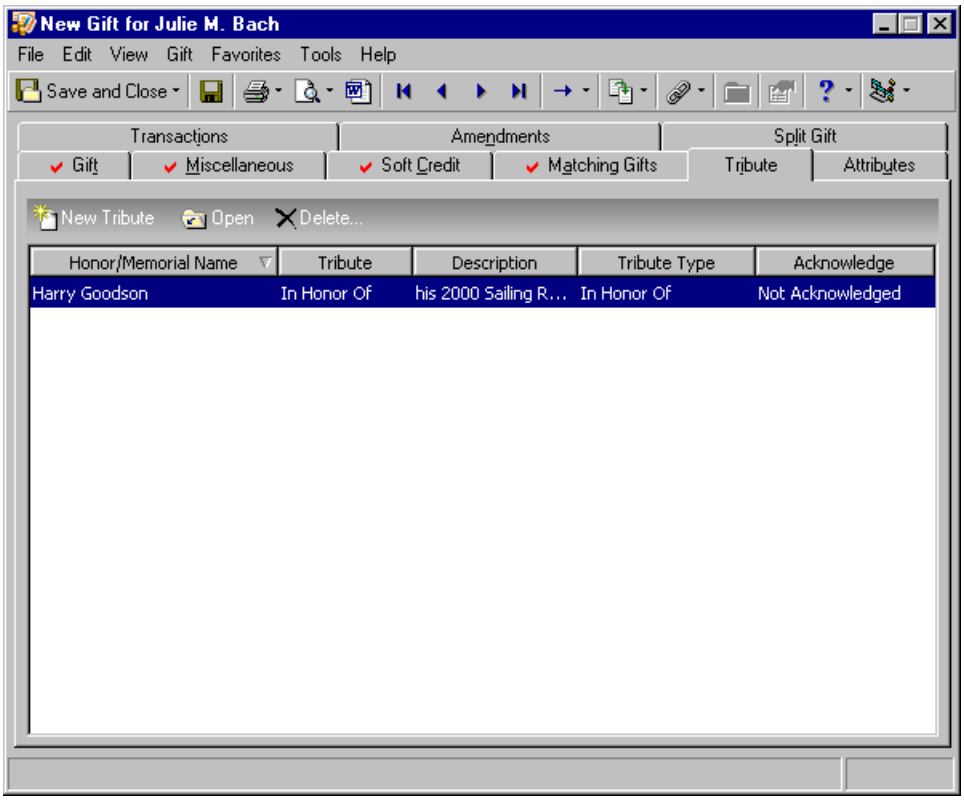


You can add a matching gift pledge to a recurring gift template the same way you add a matching gift pledge to any other gift record. For more information about adding a matching gift pledge, see "Matching Gifts" on page 247.

Tribute Tab

Note: An honor/memorial is a constituent who is being honored, memorialized, or celebrated by gifts donated to your organization. A tribute explains the reason why you are honoring, memorializing, or celebrating a constituent. For more information about tribute gifts, see the *Tribute Gifts Guide*.

If you have the optional module *Honor/Memorial Tracking*, you can designate a recurring gift to one or more tributes using the Tribute tab on the recurring gift template.

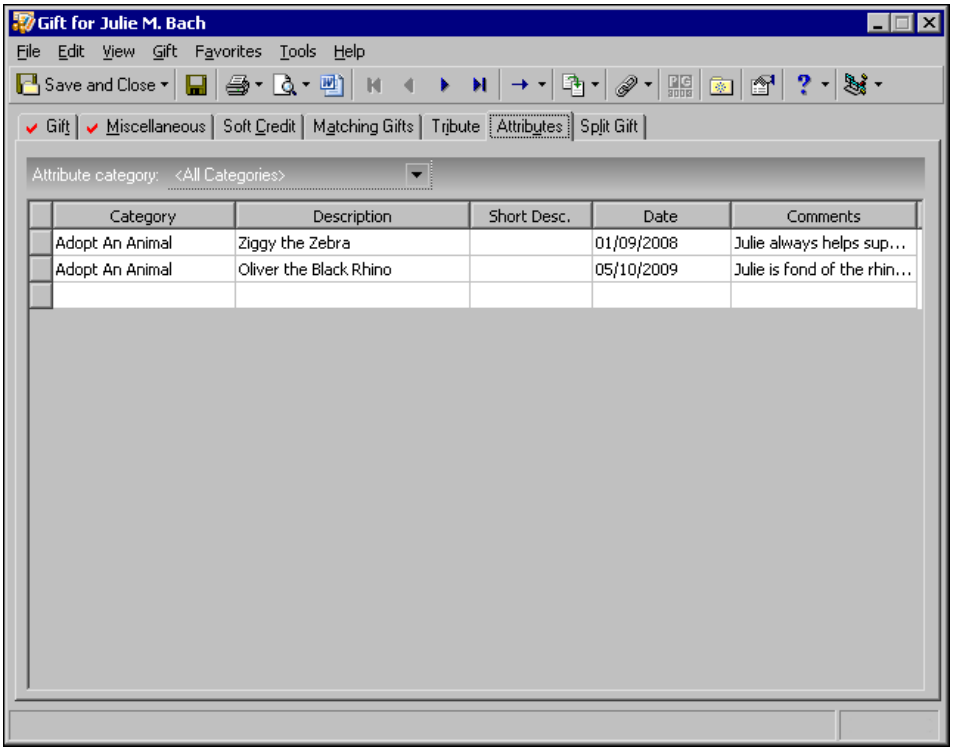


When you add honor/memorial information to the Tribute tab of the recurring gift template, the program defaults this information on the Tribute tab of each cash gift record created from the template. For example, if Julie Bach donated a recurring gift of $20 in memory of Willy Kiger, you can add the tribute to Willy Kiger on the Tribute tab of the recurring gift template. Now, every time Julie gives $20 and you generate a cash gift record, the program adds Willy Kiger's tribute on the Tribute tab of the cash gift record.

You designate recurring gifts to tributes the same way you designate any other gift type to a tribute. For more information, see the *Tribute Gifts Guide*.

Attributes Tab

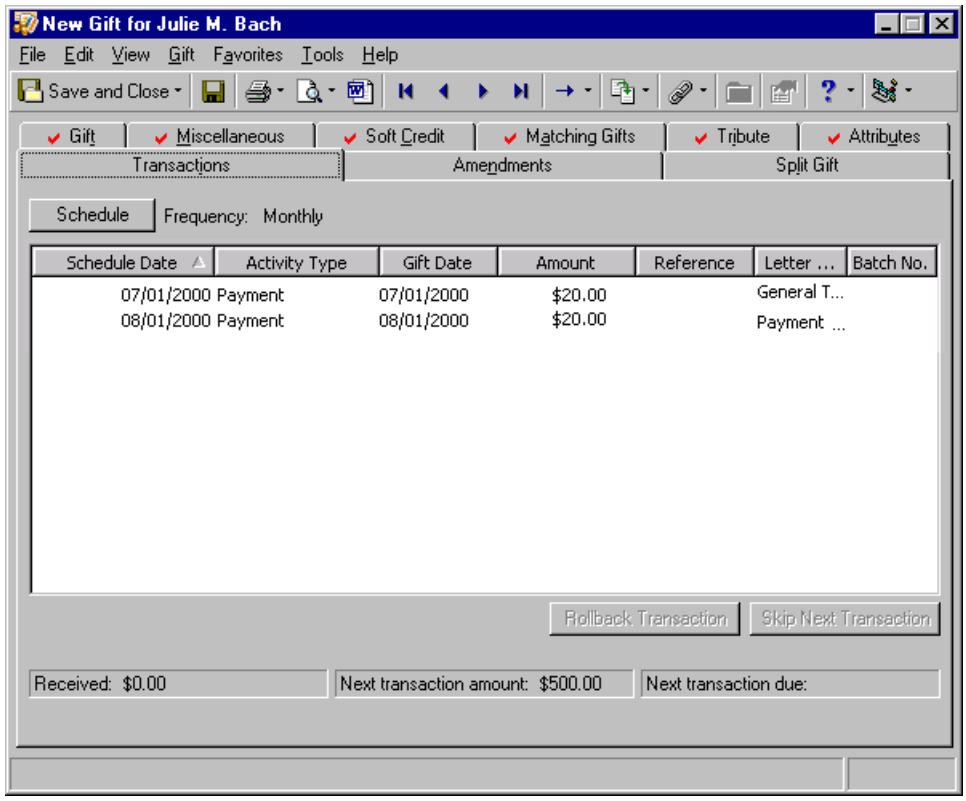
You can use attributes to add additional information about a gift. For example, your organization is a zoo with a program allowing individuals to adopt an animal for a day. When a constituent donates a gift to adopt an animal, such as Ziggy the Zebra, you can add the name of the animal and the adoption date as an attribute on the gift record.



Later, when Ziggy the Zebra becomes a mother, you can create a query of all individuals who adopted Ziggy and send them a birth announcement. If you add an attribute to a recurring gift template, the program copies the attribute to the Attributes tab of each cash gift record generated from the template. For more information about adding an attribute, see the *Configuration & Security Guide*.

Transactions Tab

When you select Recurring Gift in the **Gift type** field on the Gift tab, the Transactions tab appears so you can define the schedule for the recurring gift.

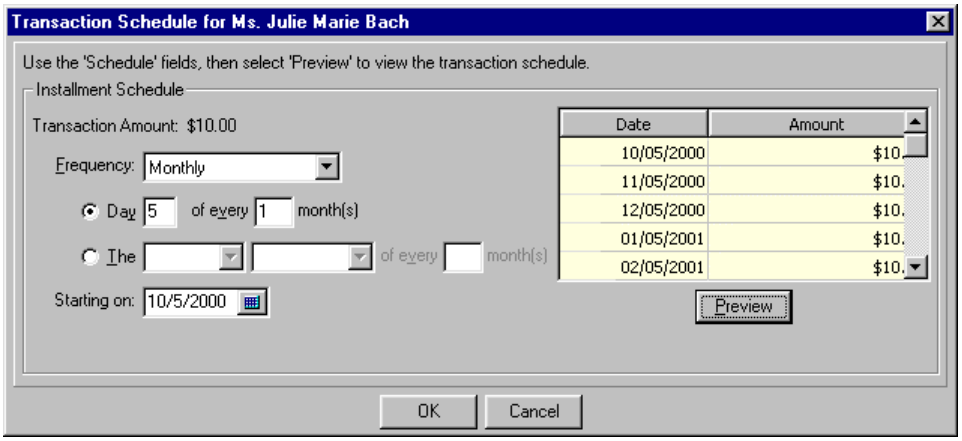


The grid displays information about all transactions generated or applied to this recurring gift. For example, if a constituent made two payments for the recurring gift, the grid displays two entries describing the date the payments were made, the amount of the payment, any reference information, and the type of letter sent acknowledging the payment. If you commit the payment to the database using *Batch*, the program also displays the batch number in which you committed the gift.

From the Transactions tab, you can define the schedule for the recurring gift and skip the next scheduled transaction. For more information, see “Scheduling a Recurring Gift” on page 218 and “Skipping a Recurring Gift Transaction” on page 237.

Scheduling a Recurring Gift

To schedule a recurring gift, click the **Schedule** button above the grid on the Transactions tab. The Transaction Schedule screen appears.

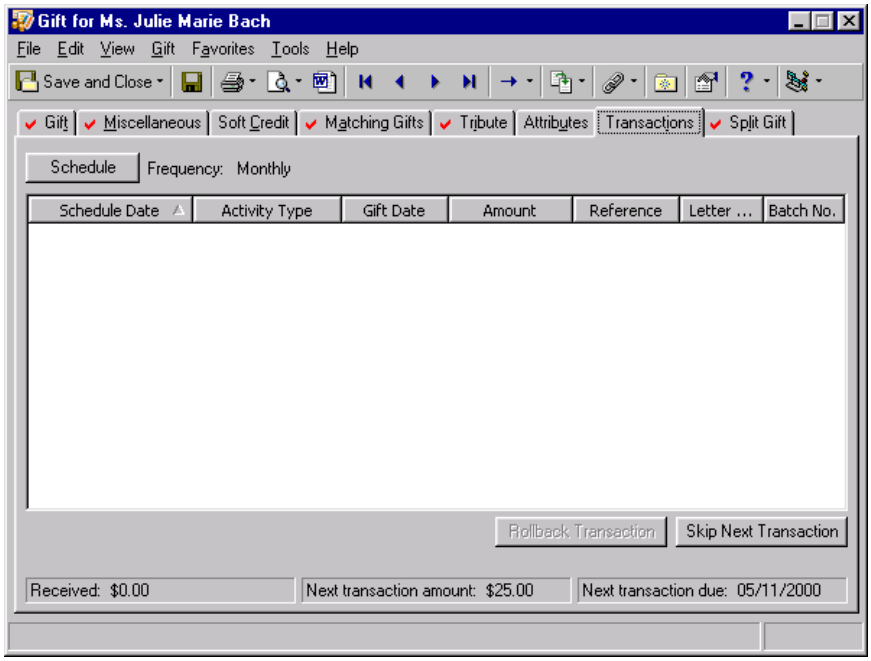


When you set up a recurring gift template, you must establish a schedule for the recurring gift. Installments can be paid on a weekly (once a week), biweekly (every two weeks), semi-monthly (twice a month), monthly (once a month), bimonthly (every two months), quarterly (four times a year), semi-annual (twice a year), or annual (once a year) schedule.

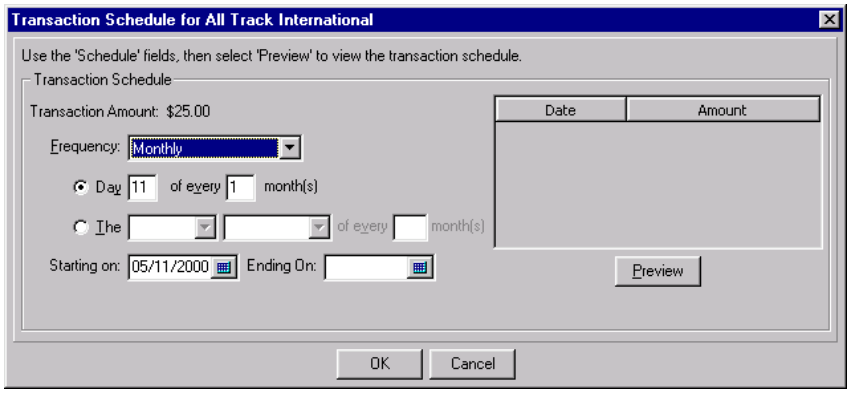
The Transaction Schedule screen walks you through the process of creating a payment schedule for the recurring gift. You select the payment frequency, the number of payments, the day payments are due, and when payments start and end. The grid displays the payment schedule according to the information you enter on the Transaction Schedule screen.

Scheduling a recurring gift

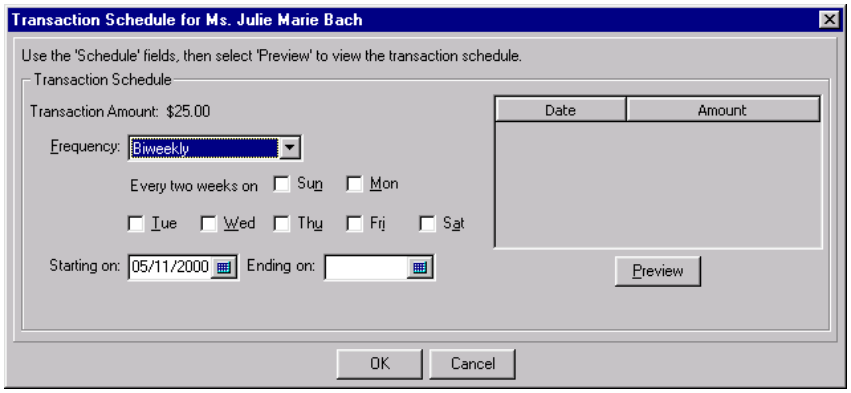
1. From a recurring gift template, select the Transactions tab. For more information about opening a recurring gift, see “Accessing a Recurring Gift” on page 197.



2. Click **Schedule**. The Transaction Schedule screen appears.



3. In the **Frequency** field, select the frequency the constituent plans to donate the recurring gift. For example, if the constituent plans to donate money every two weeks, select “Biweekly”.
4. Below the **Frequency** field, additional fields appear so you can select the particular day or date transactions are due. Because you selected Biweekly in the **Frequency** field, checkboxes appear for each day of the week.

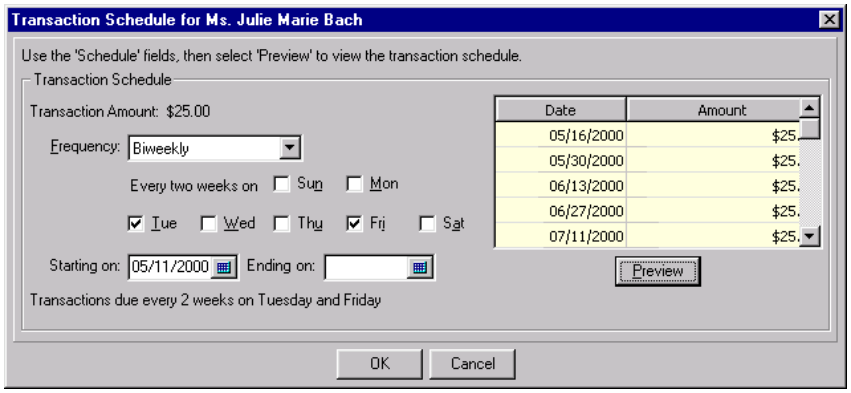


Note: If you need to reschedule a Recurring gift, you can create an amendment on the Amendments tab. For more information about amendments, see “Creating an amendment for a recurring gift” on page 221.

5. Mark the checkboxes next to the day of the week on which the transactions is due.
6. In the **Starting on** field, select the date the first payment is due. If the date you enter in the **Starting on** field is not the same date as a normally scheduled transaction date, the first transaction is due on the first transaction date occurring after the **Starting on** date.

   To stop payments for a recurring gift from generating, enter a date in the **Ending On** field. You will most likely leave this field blank, unless a constituent informs you of a stop payment date.

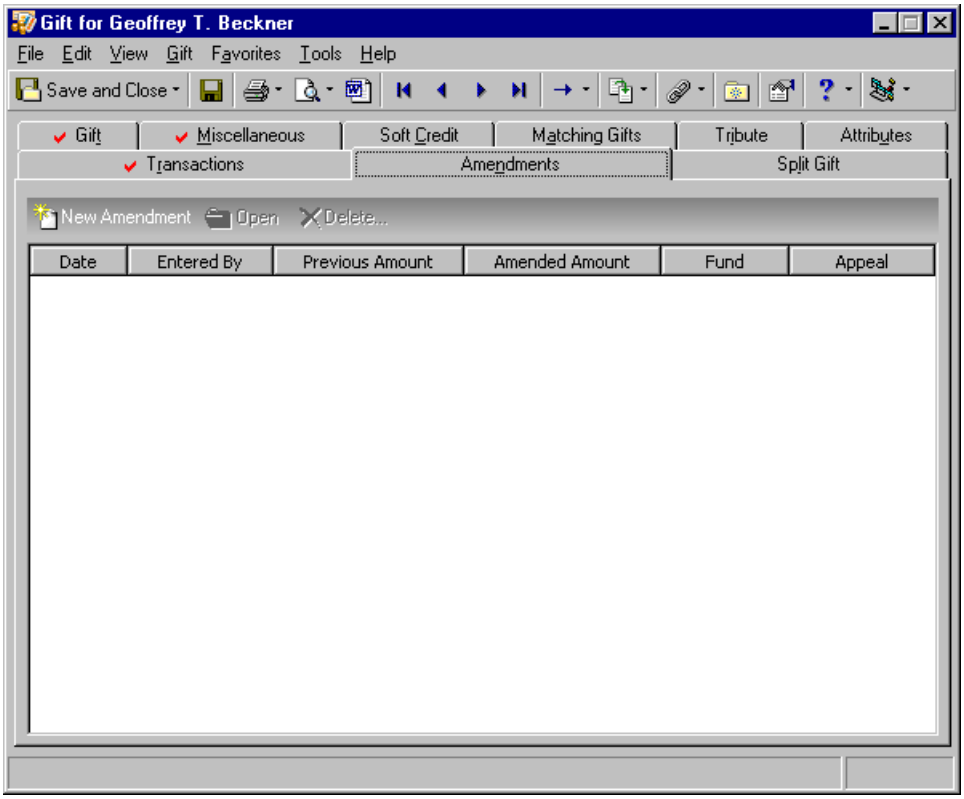
7. To display the transaction schedule in the grid, click **Preview**.



8. To return to the Transactions tab, click **OK**.
9. To save the transaction schedule and close the recurring gift template, click **Save and Close** on the toolbar.

Amendments tab

Donors may often choose to upgrade or renew a recurring gift by changing the gift amount, or they may choose to extend the ending transaction date. If a donor chooses to upgrade or downgrade a recurring gift (increase or decrease the recurring gift amount), you need to add an amendment to the gift record to track the change. For example, Marianne Lambert donates $20 every month to your Membership Campaign. After donating monthly for a year, she decides she wants to donate $50 semi-annually to the Annual Campaign. You can create an amendment to track the changes made to the recurring gift in your database.



In addition to tracking the previous amount and campaign, you can also track previous fund, appeal, package, and solicitor information. An acknowledgement letter can be sent to the donor to let her know her change in giving has been made.

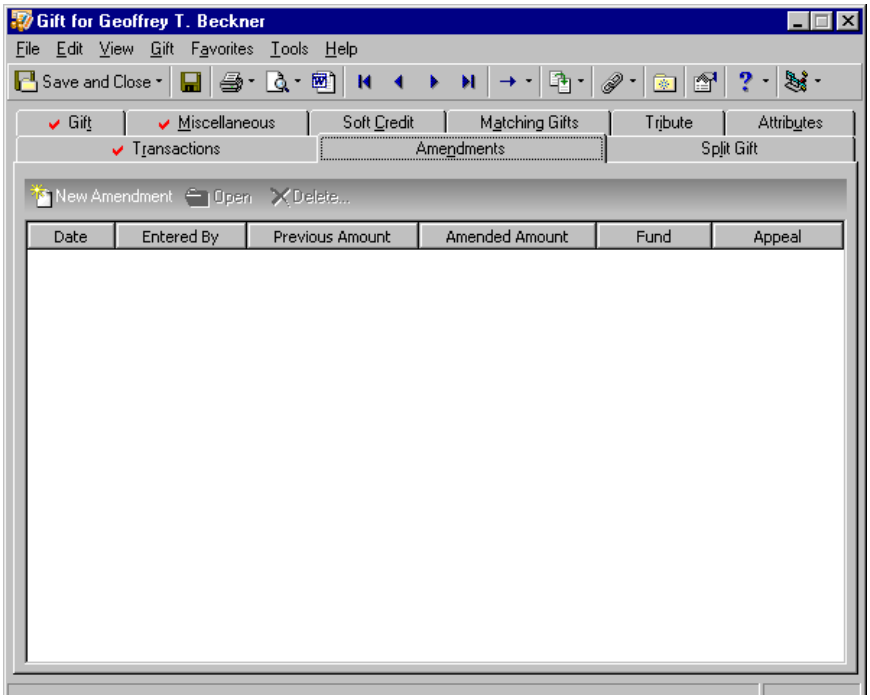
Warning: An amendment on a recurring gift takes effect immediately. If you have an amendment that does not start until a future date, you should not add the amendment until after the last payment of the old schedule. If you add the amendment at the time you receive it, the transactions appear as skipped on the Transactions tab.

An amendment on a recurring gift takes effect immediately. Therefore, if you have an amendment that does not start until a future date, you should not add the amendment until after the last payment of the old schedule. For example, Julie Bach has a recurring gift set up for $10 to be paid on the 1st of every month. Today is 10/15/2003. Julie lets you know she wants to upgrade the amount of her recurring gift to $15, starting January 2004. If you add the amendment now, the 11/01/2003 and 12/01/2003 transactions appear as skipped on the Transactions tab, and these two transactions are not processed. Add an action reminder to help you remember the appropriate date to add the amendment to your database. For more information about action reminders, see the Actions chapter of the *Constituent Data Entry Guide*.

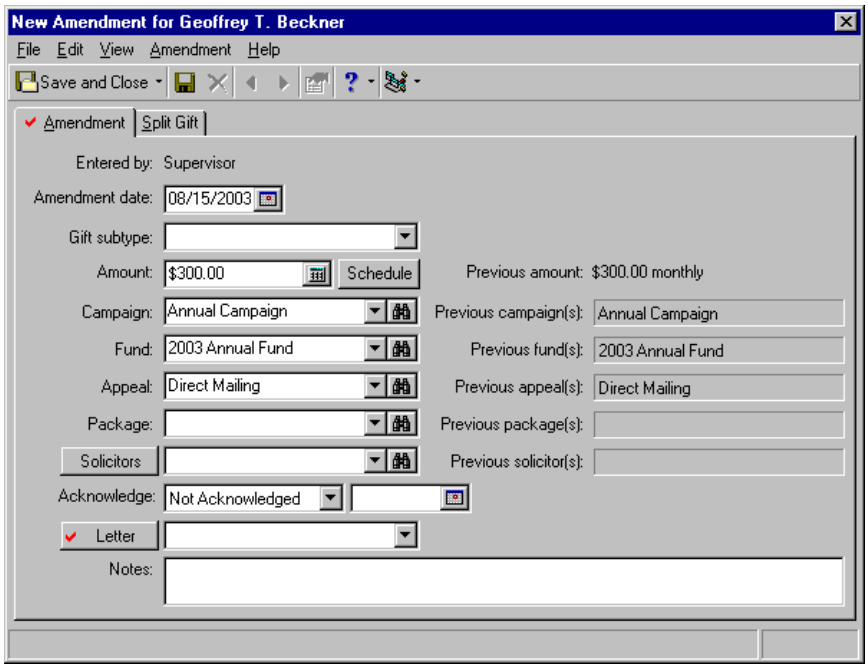
Creating an amendment for a recurring gift

Scenario: On 07/30/2003, Geoffrey Beckner donated a $300 monthly recurring gift to your organization. On 08/15/2003, he called to inform you he wanted to reduce this amount to $150 per month due to personal financial reasons. Because you already added a gift record to the database for Geoffrey's gift, you need to create an amendment to downgrade the recurring gift record.

1. From a recurring gift template, select the Amendments tab. For more information about opening a recurring gift, see "Accessing a Recurring Gift" on page 197.



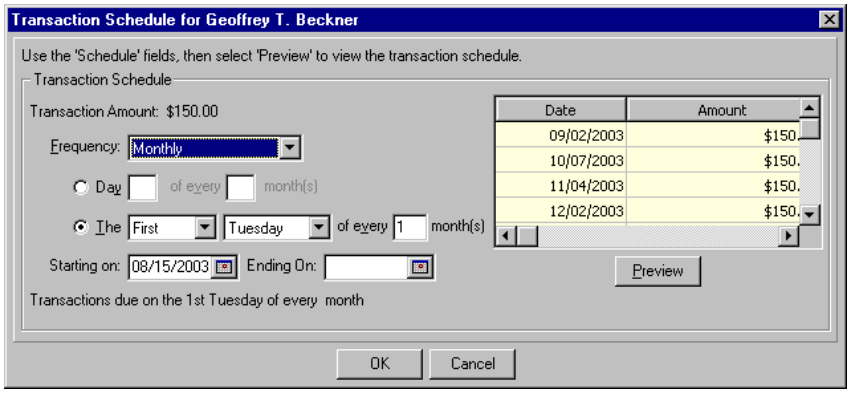
2. Click **New Amendment**. The New Amendment screen appears.



3. In the **Amendment date** field, the program defaults the date you are amending the gift. Because of Geoffrey's phone call, enter the date 08/15/2003 in the **Amendment date** field.
4. In the **Gift subtype** field, you can enter information to further define the gift. For example, you can select "Computers". In this procedure, it is not necessary to add this information.

Note: If you are converting a gift from a foreign currency to your monetary system, the **Currency type** (from the **Gift** menu, on the **Currency Exchange** screen) for an amendment cannot be different than the original **Currency type** on the recurring gift. However, you can change the **Exchange rate** for an amendment. If a constituent donates in a different currency, you must complete the recurring gift and create a new one. For more information about completing a recurring Gift, see "Completed Status" on page 208.

5. In the **Amount** field, enter the amount $150.00. This is the new amended amount of the recurring gift.
6. Click **Schedule**. The Transaction Schedule screen appears.



7. Make any changes you want to the payment schedule in the **Transaction Schedule** frame. For more information about these fields, see "Scheduling a recurring gift" on page 218.

   When creating an amendment, it is important to remember several factors.

- The first transaction date (in the **Date** column) is calculated from the **Starting on** date or the date of the last activity on the recurring gift record (the program uses the most recent date of the two).
- Any missed payments between the last payment date and the start of the new first transaction date are automatically skipped.

8. In the **Campaign** field, the program defaults the campaign from the original **Campaign** field on the Gift tab. Because you are not amending the campaign, it is not necessary to change this information.

Note: Previous information from the Gift tab displays to the right of the amended fields on the Amendment tab.

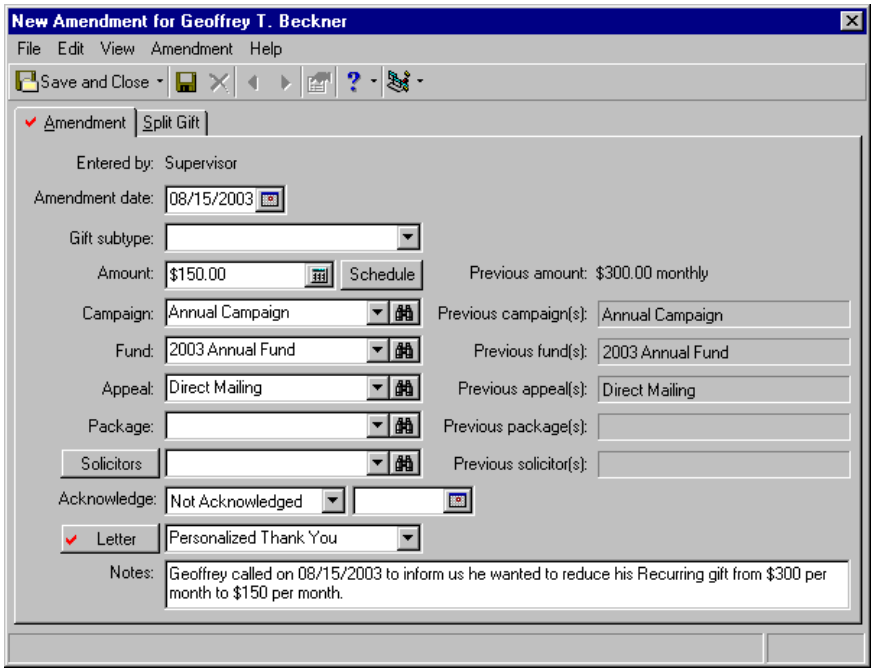
9. In the **Fund** field, the program defaults the fund from the original **Fund** field on the Gift tab. Because you are not amending the fund, it is not necessary to change this information.
10. In the **Appeal** field, the program defaults the appeal from the original **Appeal** field on the Gift tab. Because you are not amending the appeal, it is not necessary to change this information.
11. In the **Package** field, the program defaults the package from the original **Package** field on the Gift tab. Because you are not amending the package, it is not necessary to change this information.
12. In the **Solicitors** field, the program defaults the solicitor information from the **Solicitors** field on the Gift tab. For this example, the **Solicitors** field is blank, and it is not necessary to add this information.

Note: To send a manual acknowledgement letter to the donor for an amendment, you must first **Save and Close** the amendment. Then, select **File**, **Print**, **Acknowledgment** from the menu bar. For more information about acknowledging gifts, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

13. In the **Acknowledge** field, the program defaults the acknowledge information from the **Letter** field on the Gift tab.

    If the **Acknowledge** field on the Gift tab is selected to “Acknowledged”, you can select “Not Acknowledged” on the Amendment tab. This way, you can send a second acknowledgement letter to the donor to let him know the change in the recurring gift has been made.
14. In the **Letter** field, select “Personalized Thank You”, so you can send a letter to Geoffrey acknowledging the change in his recurring gift.

15. In the **Notes** box, enter “Geoffrey called on 08/15/2003 to inform us he wanted to reduce his recurring gift from $300 per month to $150 per month.”



Note: Because you are not changing the distribution of campaigns, funds, appeals, or packages, you do not need to enter information on the Split Gift tab.

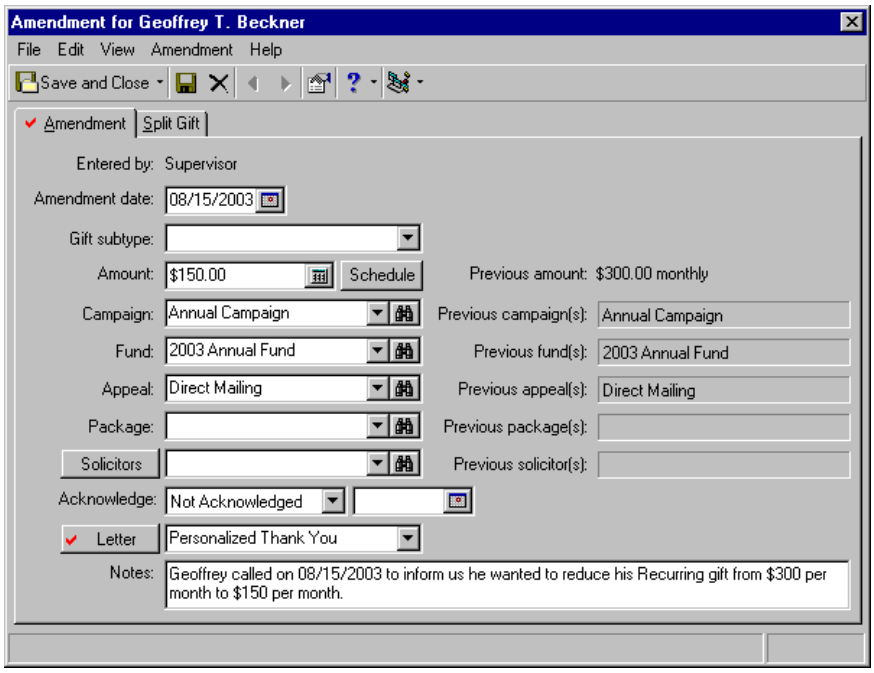
16. To save the changes and close the amendment, click **Save and Close** on the toolbar.

Viewing or editing an existing amendment

You can view or edit an amendment listed in the grid on the Amendments tab. If you have multiple amendments for a recurring gift, you can only edit the last amendment that was made. However, you can view any amendment.

1. From the Amendments tab of a gift record, select the amendment you want to view or edit. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.

2. Click **Open** on the action bar. The Amendment screen appears.

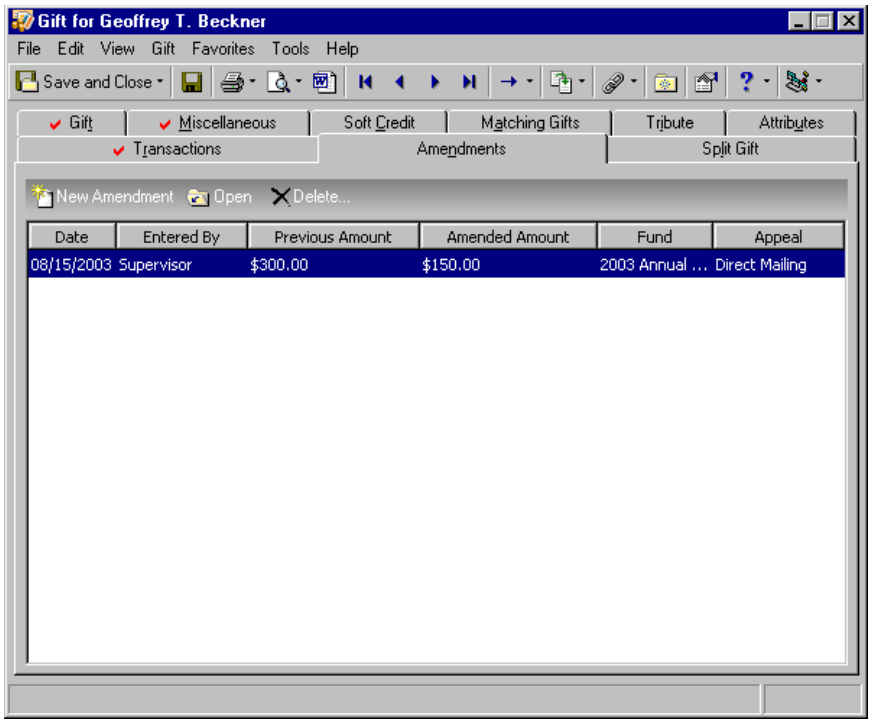


3. Edit any necessary information.
4. On the toolbar, click **Save and Close**. You return to the gift record.
5. To save the changes and close the gift record, click **Save and Close** on the toolbar.

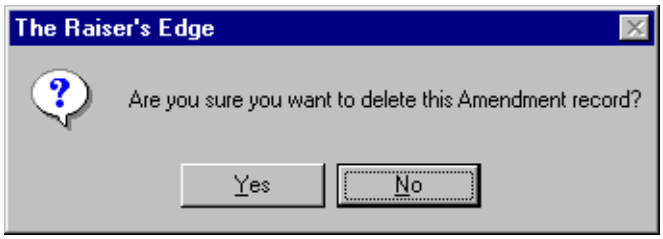
Deleting an amendment

You can delete an amendment from a recurring gift record if you have appropriate security rights. If you have one amendment, the recurring gift template information on the Gift tab takes effect immediately after you delete the amendment. If you have multiple amendments, you can only delete the most recent amendment. In this situation, information from the previous amendment takes effect immediately.

1. From the Amendments tab of a gift record, select the amendment you want to delete. For more information about opening a gift record, see “Accessing a Gift Record” on page 7.



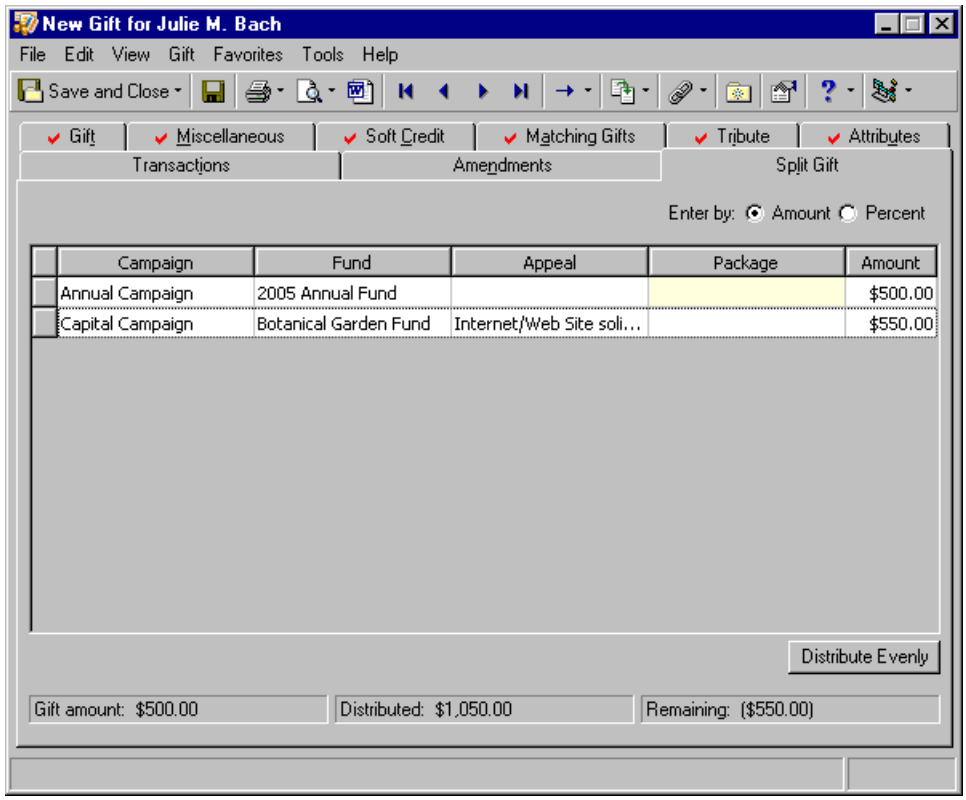
2. Click **Delete** on the action bar. A message appears asking if you are sure you want to delete the amendment.



3. To delete the amendment from the gift record, click **Yes**.

Split Gift Tab

On the Split Gift tab, you can split a recurring gift among multiple campaigns, funds, appeals, or packages. When you split a gift, the program displays the campaigns, funds, appeals, and packages you select on the Split Gift tab in the corresponding fields on the Gift tab. Then, the program disables the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab. When splitting a gift, you can edit the campaign, fund, appeal, and package information on the Split Gift tab.



When you enter information on the Split Gift tab of a recurring gift template, the program copies this information as a default to each cash gift record generated from the template. You can split a recurring gift the same way you split a gift record of any other gift type. For more information about splitting a gift, see “Split Gift Tab” on page 227.

Creating a New Recurring Gift Template

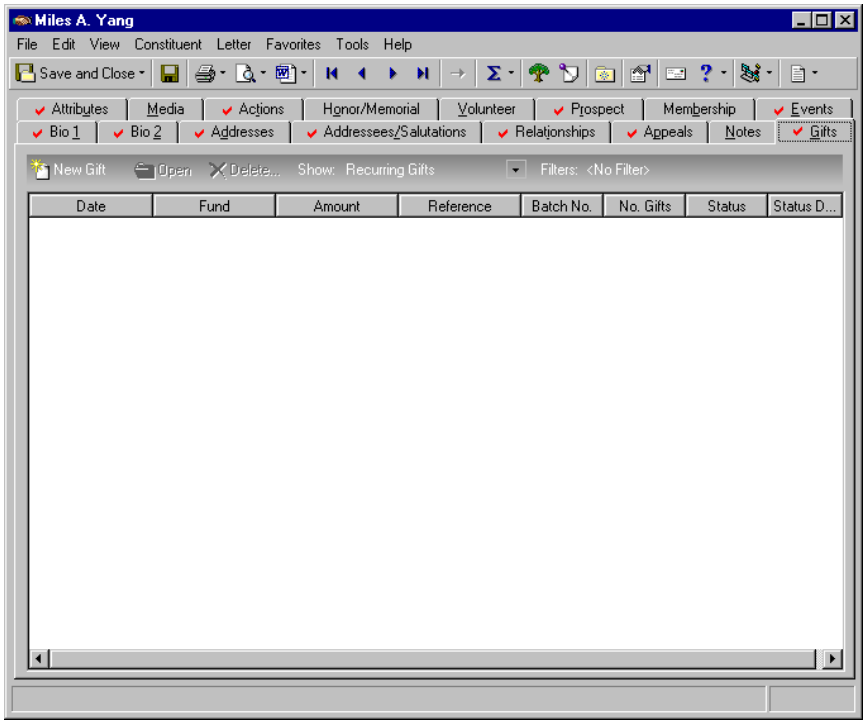
When you receive a recurring gift from a constituent, the first thing you need to do is create a recurring gift template for the constituent donating the gift.

- **Creating a new recurring gift template**

> ***Scenario:*** Dr. Miles Yang decides to donate $25 every two weeks as part of his company’s payroll giving plan. Now, you need to create a recurring gift template for Dr. Yang’s recurring gift.

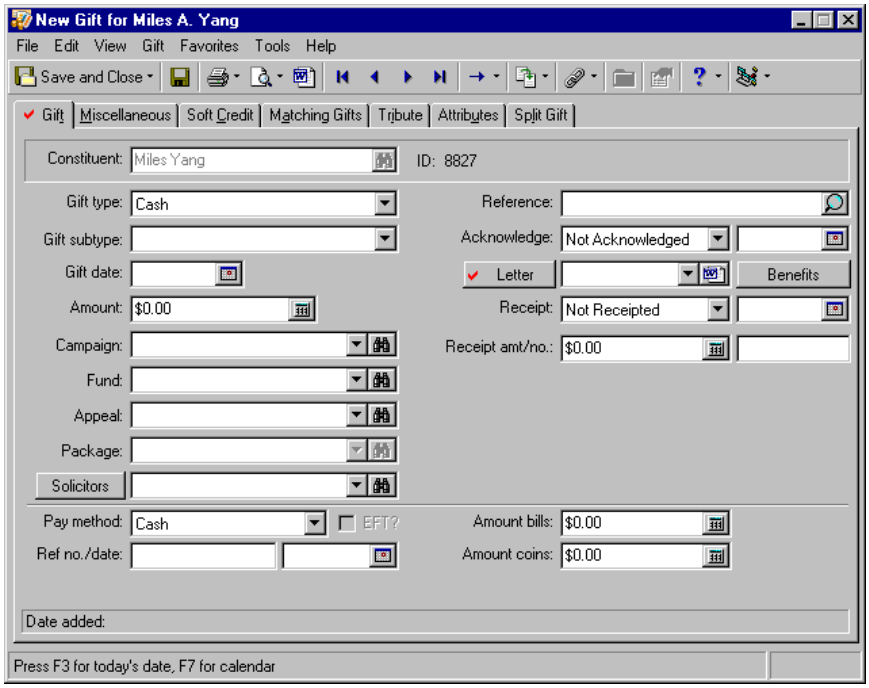
Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

1. From Miles Yang's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

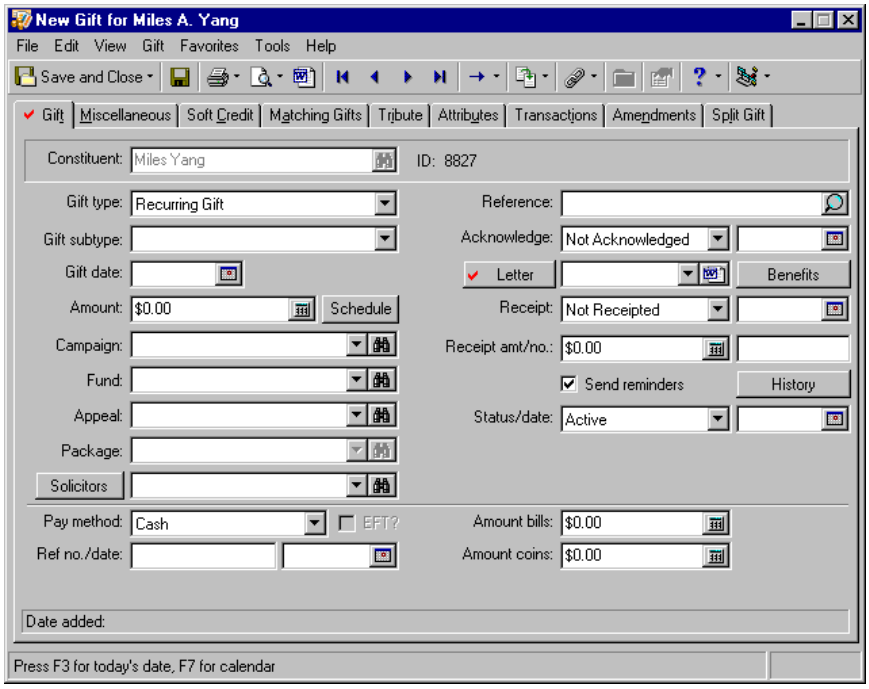


Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

2. On the action bar, click **New Gift**. The New Gift screen appears.

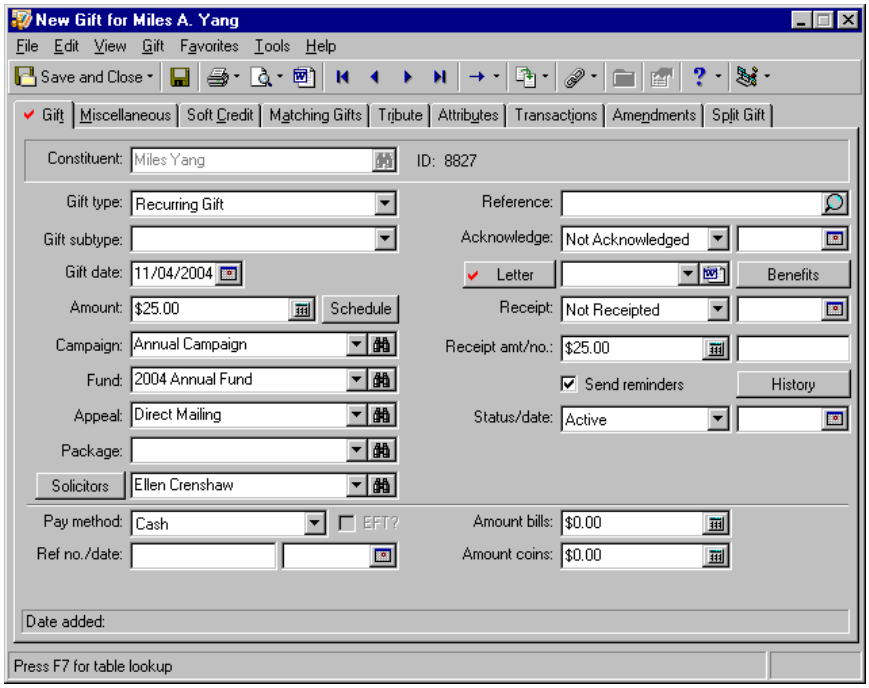


3. In the **Gift type** field, select “Recurring Gift”. The program adds the **Send Reminders** checkbox, **History** button, and **Status/date** field under the **Receipt amt/no.** fields on the Gift tab.



4. In the **Gift date** field, enter the date 11/04/2004, which is the date that Dr. Yang decided to donate the gift. This field does not affect how you establish the schedule for the recurring gift.
5. In the **Amount** field, enter the amount $25. This is the amount Dr. Yang wants to donate every time he makes a payment to your organization. After you begin generating recurring gifts, you can update the **Amount** field as necessary if Dr. Yang wants to amend the recurring amount he is donating. If you change the amount of the recurring gift, the program uses the new amount on the next generated transaction. Previously generated transactions are not affected.

6. In the **Campaign**, **Fund**, and **Appeal** fields, select “Annual Campaign”, “2004 Annual Fund”, and “Direct Mailing”. When you generate cash gift records, the campaign, fund, appeal, and package you select default on the recurring gift template to the corresponding fields on each cash gift record.



7. Click the **Solicitors** button to search the database for Ellen Crenshaw. Credit her for the full amount of the gift. For more information about the **Solicitors** button, see “Crediting Solicitors for a Gift” on page 32. The program does not credit Ellen Crenshaw when you save the recurring gift template. Instead, Ellen receives credit every time you generate a transaction for Dr. Yang’s gift.

Note: The information you enter in the **Acknowledge** field does not default to cash gift records generated from the template. For more information about the **Acknowledge** field, see “Acknowledging a Recurring Gift” on page 210.

8. In the **Acknowledge** field, select “Acknowledged” because you sent Dr. Yang a handwritten thank you note. In the date field, enter the date 11/05/2004 to indicate the date you sent the letter to Dr. Yang.
9. In the **Letter** field, select “Personalized Thank You” to indicate you sent a handwritten letter.

   You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

Note: It is not necessary to enter a receipt date or number on the template because the receipt date and number are different for each cash gift record you generate from this recurring gift template.

10. In the **Receipt** field, select “Not Receipted”. Although you cannot create a receipt for a recurring gift template, you can enter information in the **Receipt** field, so the program defaults the information on each cash gift record generated from the template.
11. In the **Receipt amt** field, the amount $25 appears automatically. Although you cannot create a receipt for the recurring gift template, you can enter information in the **Receipt amt** field so the program defaults the information on each cash gift record you create from this template.

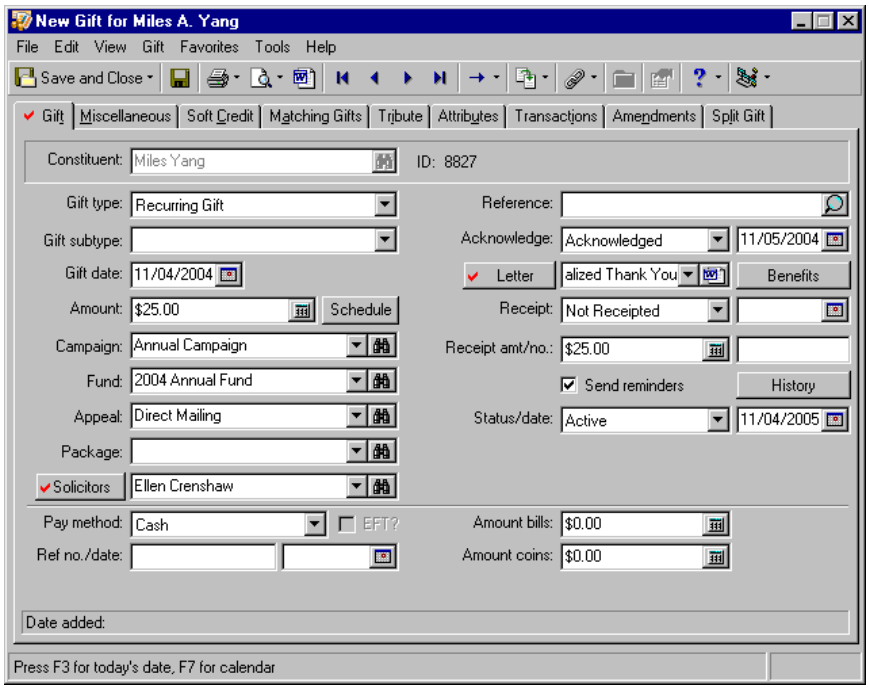
Note: If you want the **Receipt amt** field to automatically include the amount that is in the gift **Amount** field, you must set this as a rule in **Business Rules** in *Configuration*. From the **Gift options** in Business Rules, check the **When changing 'gift amount' automatically update Receipt amount** checkbox. For more information on Business Rules, see the Configuration chapter of the *Configuration & Security Guide*.

12. You want to send recurring gift payment reminders, so leave the **Send reminders** checkbox marked.
13. In the **Status/date** field, select "Active" and enter the date 11/04/2004. When you select Active in the **Status** field, you can generate cash gift records according to the schedule specified on the recurring gift template.

    You can track the reason for a status change in the **Notes** grid on the Miscellaneous tab of the gift record. For more information about the Miscellaneous tab, see "Miscellaneous Tab" on page 54.
14. In the **Pay method** field, select "Credit Card". The payment type you select in the **Pay method** field affects how the program generates recurring gift transactions. For more information, see "Entering the Payment Method for a Recurring Gift" on page 211.
15. In the **Card type** and **Card no./exp.** fields, enter the type of credit card Dr. Yang plans to use to donate gifts and the card number and expiration date associated with that card.

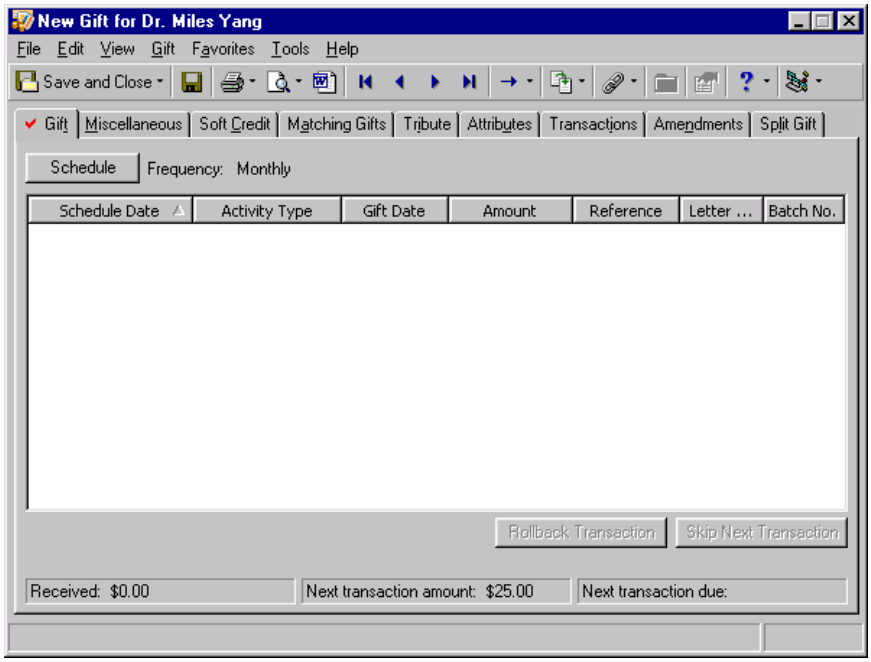
    To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, ***The Raiser's Edge*** stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** field displays a masked credit card number, with only the last four digits visible.

    The Raiser's Edge requires Internet access to connect to the Blackbaud *Payment Service*. If ***The Raiser's Edge*** cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.
16. In the **Cardholder** field, enter "Miles Yang". This is Miles's name as it appears on his credit card.

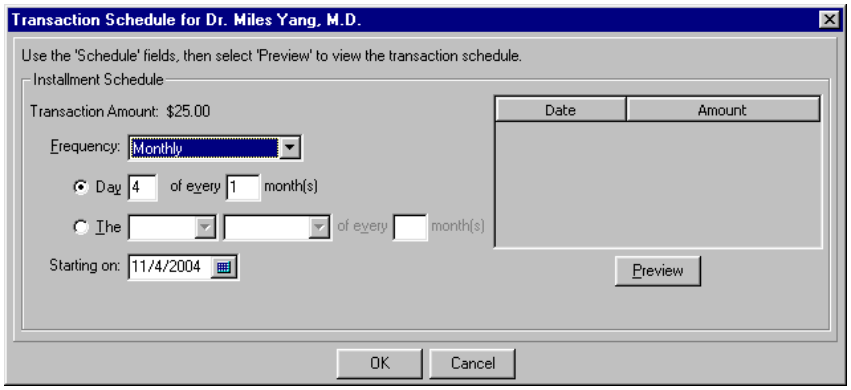


Note: The program generates transactions differently depending on whether you mark the **EFT** checkbox. For more information about generating transactions, see "Generating a Recurring Gift Transaction" on page 233.

17. If you have the optional module *Electronic Funds Transfer*, mark the **EFT** checkbox.
18. Select the Transactions tab.

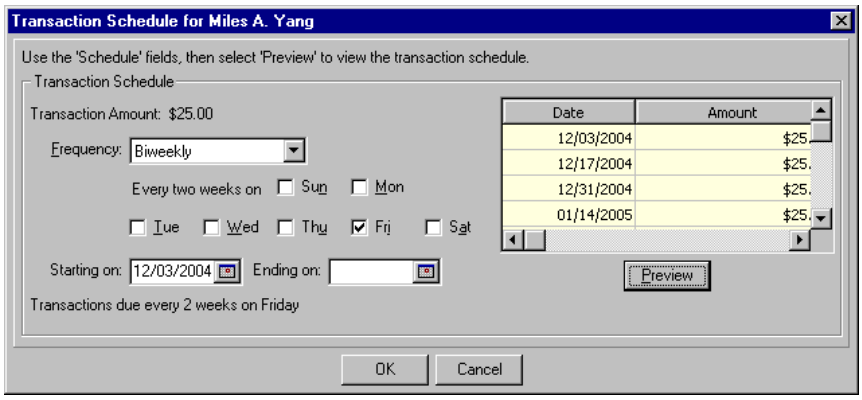


19. Click **Schedule**. The Transaction Schedule screen appears.



20. In the **Frequency** field, select “Biweekly” because Dr. Yang wants to make payments every two weeks.
21. In the **Every two weeks on** field, mark the **Friday** checkbox because Dr. Yang wants to make payments every other Friday.
22. In the **Starting on** field, enter the date 12/03/2004 because Dr. Yang wants to begin making payments in December.

23. To view the transaction schedule, click **Preview**.



24. Click **OK**. You return to the Transactions tab.
25. To add Dr. Yang's recurring gift template to the database, click **Save and Close** on the toolbar.

Recurring Gift Transactions

Once you create a recurring gift template and the constituent begins donating gifts according to a schedule, you need to create cash gift records for the recurring gift. When a constituent cannot pay a particular transaction for a recurring gift, you can skip the transaction without changing the schedule for the recurring gift.

Generating a Recurring Gift Transaction

You can generate transactions for recurring gifts in several ways. You can create a new gift record and apply it to the recurring gift. If you have the optional module *Electronic Funds Transfer*, you can use the **Automatically Generate Transactions/Payments** menu option in *Batch* to create new cash gift records from the template.

Applying a Gift Record to a Recurring Gift

When you receive a transaction for a recurring gift, you can add a new gift record for the transaction and apply it to the recurring gift.

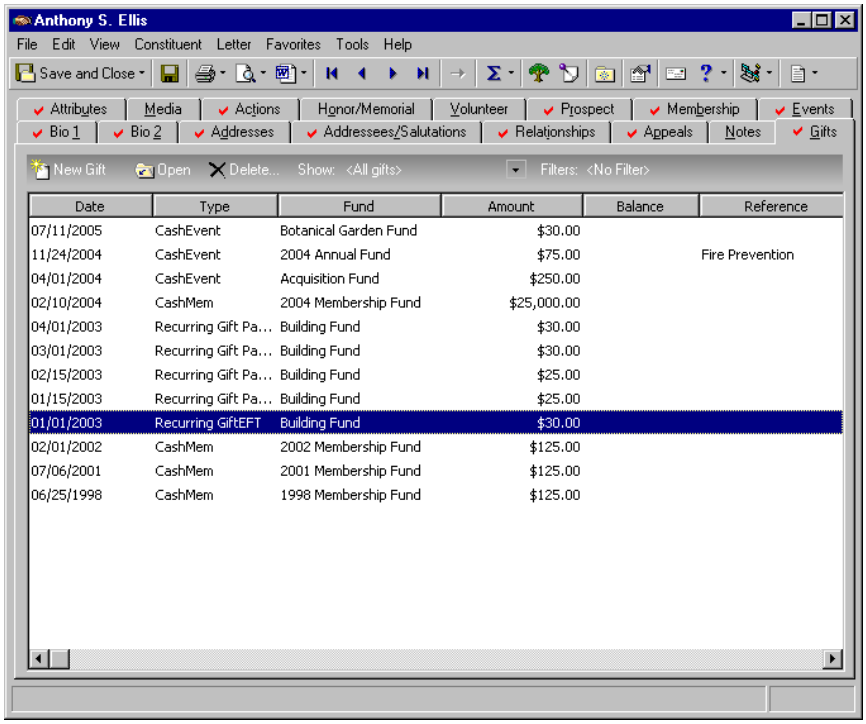
- **Applying a gift to a recurring gift**

  You can use this procedure to generate a new transaction for recurring gifts with electronic or non-electronic payment types.

> ***Scenario:*** Anthony Ellis decides to give a recurring gift to your organization on 01/01/2003. You already added a recurring gift template for this gift. On 07/01/2003, you receive Anthony's payment of $30 for his recurring gift. You need to create a gift record for this gift and apply it toward Anthony's existing recurring gift template.

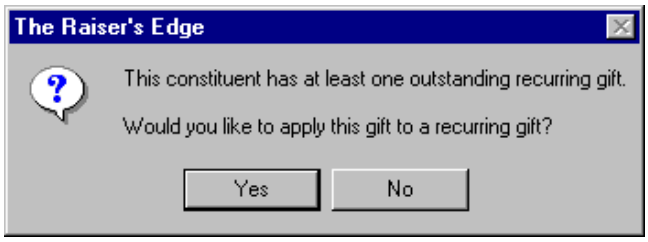
Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

1. From Anthony Ellis's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



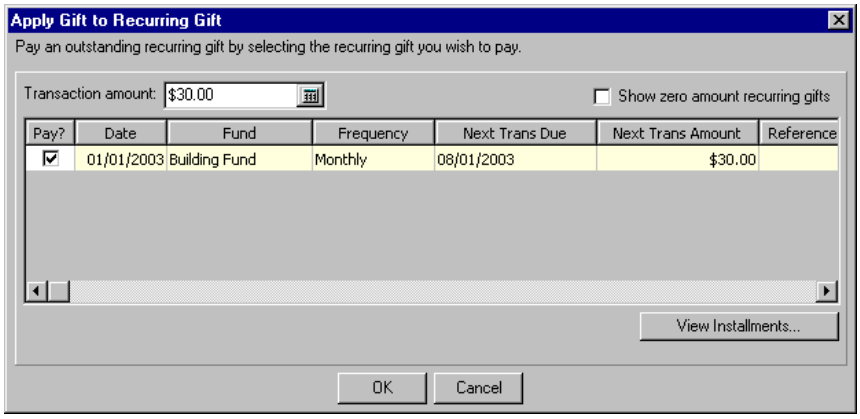
Note: This message appears if you mark the **When adding a gift warn if constituent has outstanding recurring gifts** checkbox in the **Business Rules** section of *Configuration*. If this message does not appear, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Recurring Gift**.

2. On the action bar, click **New Gift**. The program displays a message.



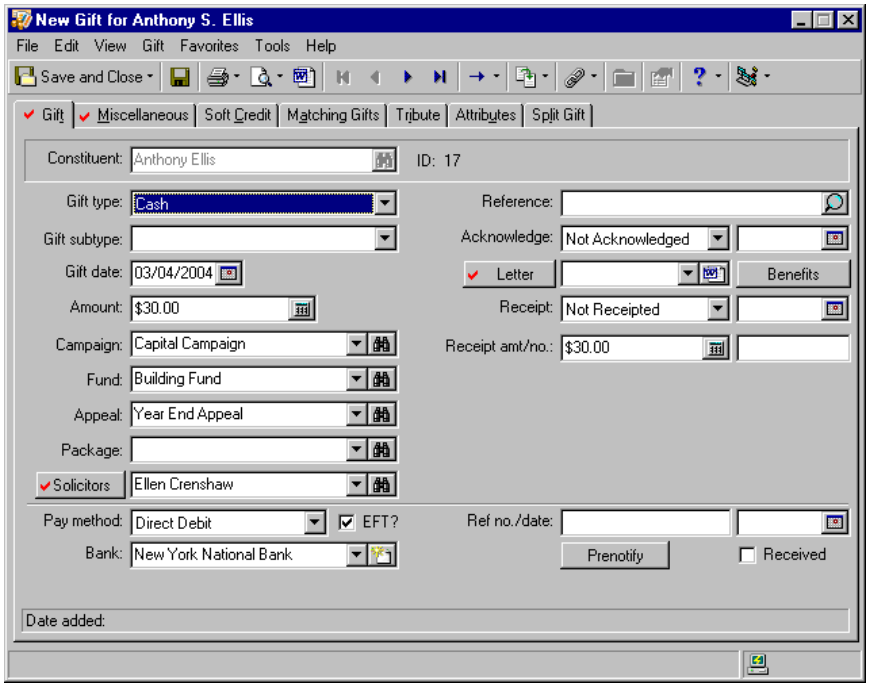
Note: When a constituent has several recurring gifts, you can specify the recurring gift you want to pay by marking the checkbox in the **Pay?** column next to the recurring gift you want to pay. After you select the recurring gift you want to pay, click **OK**.

3. To apply Anthony's payment toward his existing recurring gift, click **Yes** on the Apply Gift to Recurring Gift screen that appears.



4. In the **Transaction amount** field, enter the amount $30. This is the amount Anthony sent to pay the recurring gift.

5. To automatically apply the gift to Anthony's existing recurring gift, click **OK**. You return to the gift record. The program defaults information from the recurring gift template to the gift record for Anthony's first recurring gift transaction.



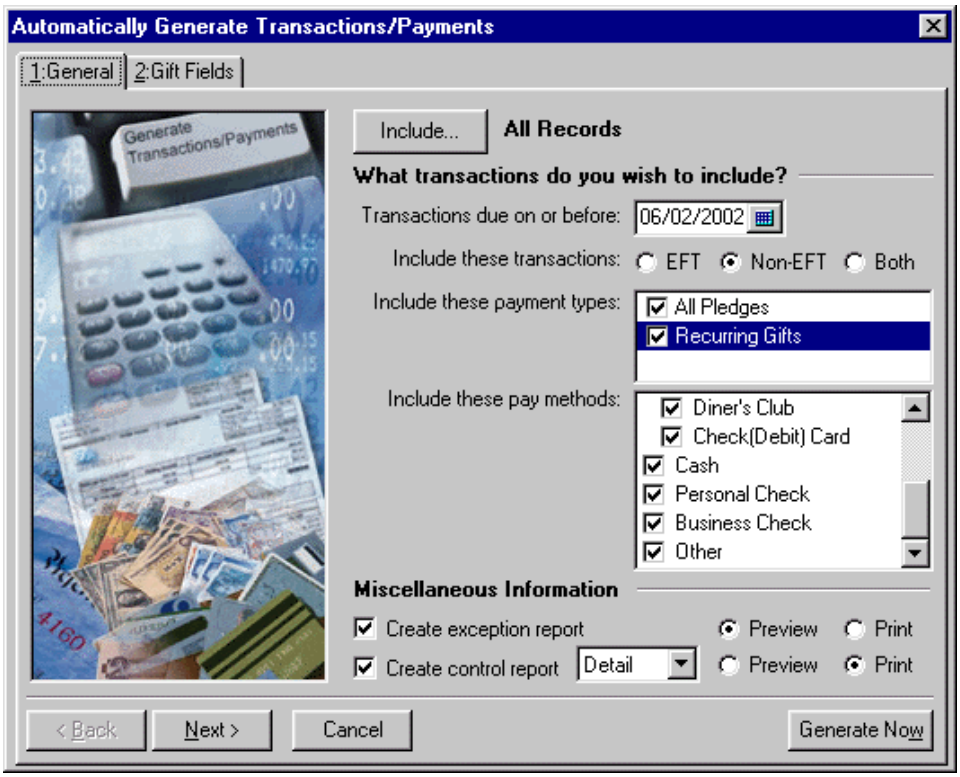
6. To add the gift record to the database and apply it toward Anthony's existing recurring gift template, click **Save and Close**.

Generating Transactions from Batch

You can generate transactions for multiple recurring gifts at once in *Batch*. The method you use to generate cash gift records from the recurring gift template differs depending if you have the optional module *Electronic Funds Transfer*. We strongly recommend you read the *Batch Guide* before generating transactions for recurring gifts using *Batch*.

Generating Transactions with Electronic Funds Transfer

If you have the optional module *Electronic Funds Transfer*, you can generate transactions for multiple recurring gift templates with both electronic and non-electronic payment types. To generate transactions, create a new gift batch and select **Tools**, **Automatically Generate Transactions/Payments** from the menu bar. The Automatically Generate Transactions/Payments screen appears so you can select the recurring gift templates for which you want to generate transactions.



The *Electronic Funds Transfer (EFT) Guide* explains how to automatically generate pledge payments and recurring gift transactions using the **Automatically Generate Transactions/Payments** option.

Generating Transactions without Electronic Funds Transfer

If you have the optional module *Electronic Funds Transfer*, you can apply recurring gift transactions to existing recurring gift templates in two ways. If you receive a payment for a recurring gift transaction, you can enter the cash gift in a batch and apply it to the appropriate recurring gift template. This method is similar to the method you used in “Applying a gift to a recurring gift” on page 233 to apply a cash gift record to a recurring gift template.

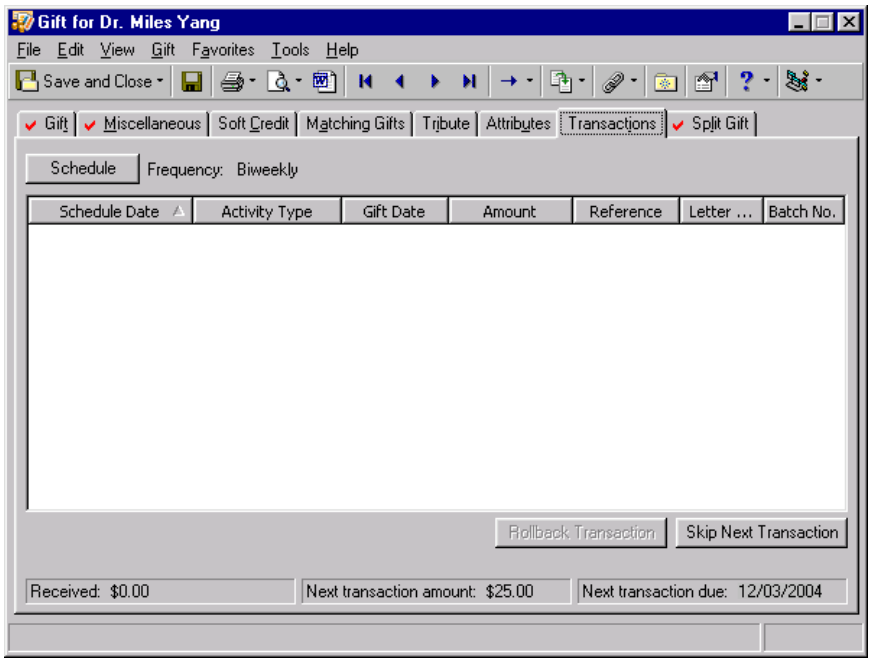
If you receive a group of recurring gift transactions at a specified interval, you may want to use a recurring batch to save time during data entry. For example, many employees of Toy World, Inc., participate in a payroll giving plan. For this giving plan, employees choose to donate a specific amount from their paycheck to your organization at a bi-weekly interval. Because you receive all donations from the giving plan at the same interval, you may want to set up a recurring batch to save time during data entry. In this recurring batch, you can enter cash gifts and apply the cash gifts to the appropriate recurring gift templates. Every time you commit the recurring batch, the program adds a new transaction for each recurring gift. For more information, see the *Electronic Funds Transfer (EFT) Guide*.

Skipping a Recurring Gift Transaction

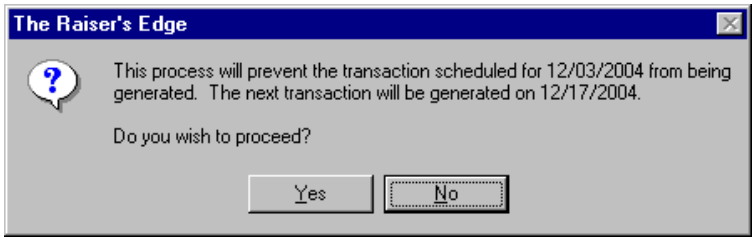
After you define the transaction schedule on the recurring gift template, there can be situations when a donor needs to skip individual transactions. For example, Deborah Riley, who donates a monthly recurring gift of $100, was recently in a traffic accident. She called to tell you she cannot donate to your organization this month because she has unexpected car repair expenses. Instead of redefining the transaction schedule on her recurring gift template, you can skip a transaction. When you skip a transaction, the program creates an entry on the Transactions tab of the recurring gift template to indicate a transaction was skipped. If you decide to skip a transaction and the donor later sends a gift, you can remove the skipped transaction entry from the grid.

Skipping a recurring gift transaction

1. From the recurring gift template, select the Transactions tab. For more information about accessing a recurring gift template, see “Accessing a Recurring Gift” on page 197.

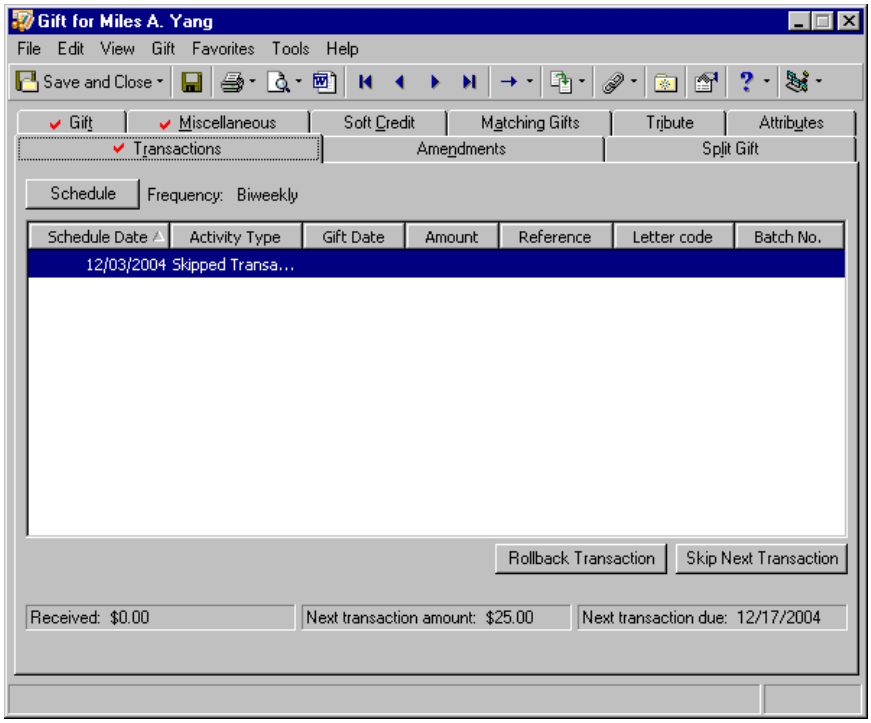


2. Click **Skip Next Transaction** at the bottom of the screen. A message appears.



Note: There is no limit to the number of transactions you can skip.

3. To skip the next scheduled transaction, click **Yes**. The program adds an entry to the grid to indicate you skipped a transaction. The program also updates the status bar at the bottom of the screen to reflect the new date and amount for the next transaction due.

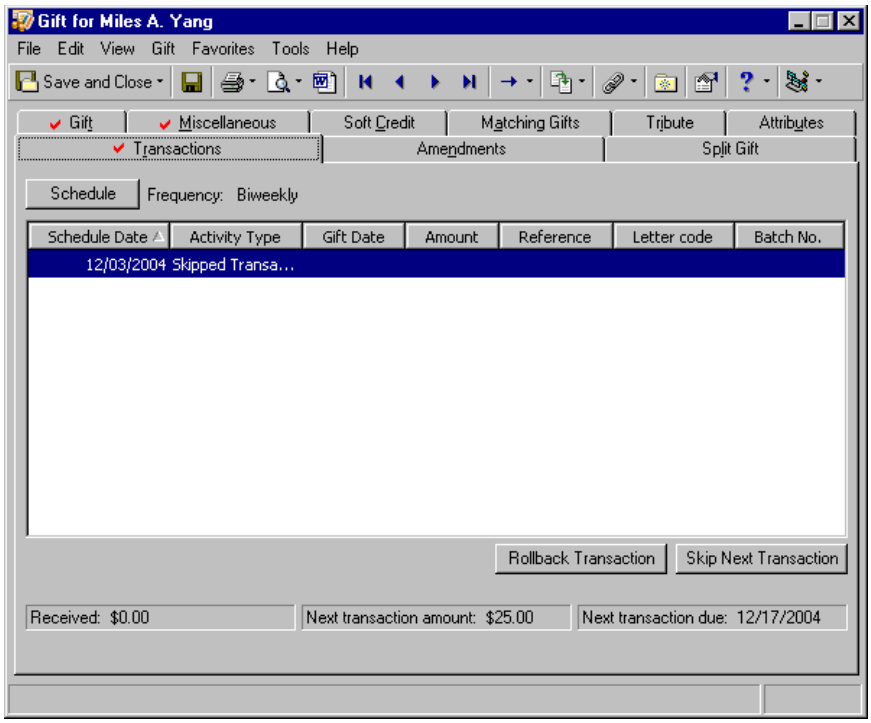


4. On the toolbar, click **Save and Close**.

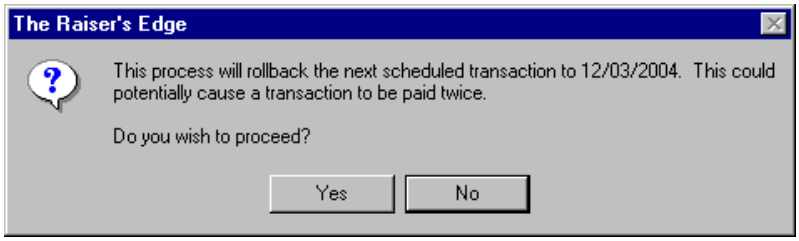
- **Paying a skipped transaction**

  If a constituent sends a donation for a skipped recurring gift transaction, you can remove the skipped transaction as long as you have not generated another transaction after the skipped transaction you want to pay.

  1. From the recurring gift template, select the Transactions tab and select the skipped transaction you want to pay. For more information about accessing a recurring gift template, see “Accessing a Recurring Gift” on page 197.



  2. Click **Rollback Transaction**. A warning appears.



  3. To proceed, click **Yes**. The skipped transaction entry is removed from the grid.
  4. Pay the transaction using your normal method. For more information, see “Generating a Recurring Gift Transaction” on page 233.

Unapplying a Recurring Gift Transaction

Warning: If you need to delete a payment for a Recurring gift, it is important to take an additional step on the Recurring gift template. After deleting the payment, open the Recurring gift record. Select the Transactions tab and click **Rollback Transaction**. This resets the date for your payment schedule in the **Next transaction due** field (in the lower right corner on the Transactions tab). Resetting the date is important to avoid unintentional skipped transactions.

On occasion, you may apply a gift toward a recurring gift transaction in error. For example, Mary Sanders sends a check for $50 to your organization. Because Mary is giving a recurring gift, you create a new transaction from the recurring gift template. Later, you realize Mary sent the check to purchase holiday cards. To correct this problem, you can unapply Mary's gift from the recurring gift template. To unapply a transaction from a recurring gift template, you must delete the gift payment from the database and add it again as a new gift to ***The Raisers' Edge***. For information about deleting a gift record, see "Deleting a Gift Record" on page 90.

Converting Pledges to Recurring Gifts

You may find it necessary to convert certain pledge gifts to recurring gifts. For example, pledges have an installment schedule with an end payment date and a total amount. Recurring gifts do not. If you had ***The Raiser's Edge 6***, you may have added open-ended gifts to your database as Pledges (because Recurring gifts did not exist). Use the Converting Pledges to Recurring Gifts facility to convert these gifts to recurring gifts in ***The Raiser's Edge 7***.

Before running the Convert Pledges to Recurring Gifts facility, you must create a gift query of records to use for your conversion. By doing this, you can review your query results to make sure you have the correct gifts you want to convert. For more information about *Query*, see the *Query & Export Guide*. For more information about details of the conversion process, see "Converting Pledges to Recurring Gifts Considerations" on page 241, "Converting Pledges to Recurring Gifts" on page 243, and "Converting Pledges to Recurring Gifts Exceptions" on page 245.

Converting Pledges to Recurring Gifts Considerations

Warning: Before you convert any gift records in ***The Raiser's Edge***, you should have a complete backup of your database. Once you convert the records, the conversion change is permanent. You can use the Blackbaud Management Console to successfully back up your data. For more information, see the *Database Administration Guide*.

Most fields convert from the Pledge gift record to the corresponding field on the Recurring gift record. The following table explains important information you need to know to completely understand the details of the conversion process.

Consideration	Notes
Gift amount	The installment amount converts to the Recurring gift amount. All other amounts in the gift record convert based on the new gift amount (for example, soft credit amount or split gift amount).

Consideration	Notes
Write-offs	If a pledge has a write-off, the amount of the Recurring gift converts as the next unpaid installment amount. If all installments are paid, the Recurring gift amount is the last non-zero paid installment. If the write-off is for an entire installment, a skipped transaction is generated during the conversion. Attributes and notes for write-offs are lost during the conversion because Recurring gifts do not have write-offs.
Receipt amount	The receipt amount for Pledges marked "Receipted" converts as the receipt amount for the Recurring gift. The receipt amount for Pledges marked "Not Receipted" or "Do Not Receipt" converts as the new Recurring gift amount (minus any benefit amounts in the gift record).
Posted Pledges or Pledge payments	Posted Pledges and Pledge payments are not reversed during the conversion and Recurring gifts do not post. If you use ***The Financial Edge***, it is important you consider the outcome of using the Convert Pledges to Recurring Gifts facility and decide what is best for your organization. For example, account balancing problems can arise for Pledges that have not been paid off if you post Recurring gift payments and Pledge payments to different GL accounts. If you use ***The Financial Edge***, we recommend you review details for this conversion facility and posting to ***The Financial Edge*** in the *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.
If more than one payment is applied to a single installment	The first payment is applied to the Recurring gift transaction. Other payments convert as Cash. The Miscellaneous tab for the Cash gift record contains information about the original Pledge record in the **Notes** section (such as the date of the original Pledge, the type "Convert Pledges to Recurring Gifts", and the note "A Cash gift was created because multiple payments were applied to a single installment." in the **Notes** box). You can query on these Cash gifts by filtering the information from the Miscellaneous tab. For example, in *Query*, you can filter on **Type** equals "Convert Pledges to Recurring Gifts". For more information, see the *Query & Export Guide*.
If a payment pays off multiple installments on the same Pledge	The Recurring gift payment converts as the first transaction paid by this Pledge payment. Other transactions paid by this payment convert as skipped. This sets the **Next transaction due** date correctly.

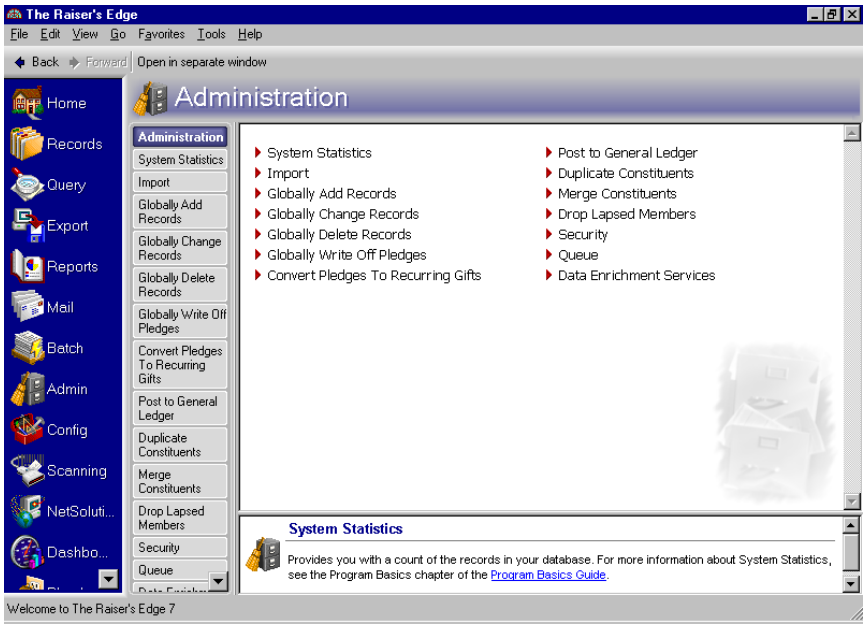
Consideration	Notes
Pledge balance is $0	The Recurring gift status converts as "Completed". The date of the last payment converts to the gift status date field.

Converting Pledges to Recurring Gifts

Warning: Before running the Convert Pledges to Recurring Gifts facility, you must create a gift query of records to use for your conversion. When you do this, make sure you have the correct gifts you want to convert in your query results. For more information about *Query*, see the *Query & Export Guide*.

You may find it necessary to convert certain Pledge gifts to Recurring gifts. For example, you committed a batch of gifts for payroll deductions as Pledges in *Batch*. The gifts should have been committed as Recurring gifts because that gift type does not include an ending payment date or total amount. Use the Convert Pledges to Recurring Gifts facility to convert the gifts from Pledge gift records to Recurring gift records.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.



Note: For information about converting Pledges to Recurring gifts and posting to ***The Financial Edge***, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

2. Click **Convert Pledges to Recurring Gifts**. The Convert Pledges to Recurring Gifts screen appears.

Note: You can only use a gift query in the Convert Pledges to Recurring Gifts facility.

3. In the **Include** field, select a query of specific gift records to include in your conversion. For more information about *Query*, see the *Query & Export Guide*.
4. If you want to process the payments using *Electronic Funds Transfer*, select **Mark Recurring Gifts as EFT**. For more information about *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.
5. To create a control report for conversion, mark **Create control report**. A control report explains converting Pledges to Recurring gifts details.

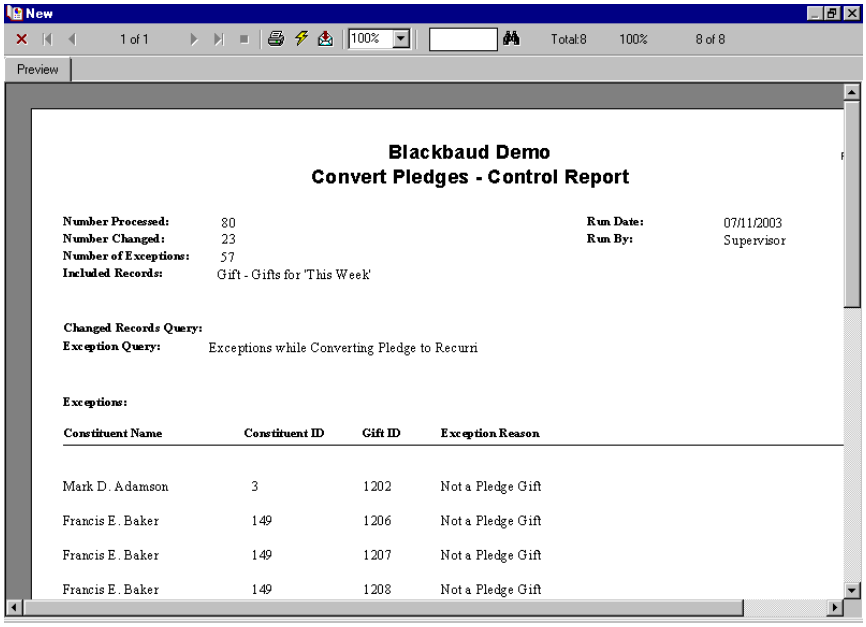
Note: We recommend that you print a control report. The control report lists important information, such as the number of changed records and exceptions. You can print this report by selecting **Print** on the Converting Pledges to Recurring Gifts screen or by clicking **Print** on the control report preview screen.

6. To preview the control report, select the **Preview** option.
7. To create a query of gift records that do not convert, mark **Create exception query**.
8. To create a query of gift records that change during the conversion, mark **Create query of changed records**.

Note: To convert a single Pledge gift record to a Recurring gift record, open the Pledge gift record. From the **Gift** menu, select **Convert Pledge to Recurring Gift**.

9. To begin the conversion process, click **Convert Now**.

Because you marked the **Create control report** checkbox and selected **Preview**, the Convert Pledges—Control Report appears when the conversion completes.



10. To print the Control Report, click **Print** on the toolbar.
11. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the Administration page.

Converting Pledges to Recurring Gifts Exceptions

Note: For information about converting Pledges to Recurring gifts and posting to ***The Financial Edge***, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*.

Because there are differences between pledges and recurring gifts, not all gifts can convert from pledges to recurring gifts. Matching gift pledges do not convert to recurring gifts using this facility because regular pledges and recurring gifts are not matched (the payments for them are matched). The following table is a list of possible exceptions and exception reasons.

Exception	Exception Reason
Pledge has a payment other than "Pay-Cash"	A Recurring gift payment can only be Cash. Therefore, Pledge payments other than Cash cannot convert to a Recurring gift payment.
Pledge is linked to a Membership, Event, or Proposal	Because you cannot apply more than the gift amount to a membership, event, or proposal record, any Pledge linked to a membership, event, or proposal record is an exception.
Pledge or one of its payments has been posted and has an adjustment that has not been posted	Recurring gifts do not post. If a posted Pledge has an adjustment that has not been posted, you must post the adjustment before you can convert the Pledge to a Recurring gift.
Gift is not a Pledge	Only gifts with a gift type of Pledge convert.

Exception	Exception Reason
Pledge schedule has an installment frequency of “Irregular”	Recurring gifts cannot have an “Irregular” installment frequency.
Pledge schedule has an installment frequency of “Single Installment”	Recurring gifts cannot have a “Single installment” installment frequency.
Pledge has a payment that is applied to more than one Pledge	A Recurring gift payment can only be applied to a single Recurring gift transaction.
Pledge has a payment that is paid by another constituent	Recurring gift payments can only be paid by the constituent that the Recurring gift is for.
The total value of benefits exceeds the new gift amount	If the benefit amount exceeds the Recurring gift amount, the receipt amount (Recurring gift amount minus benefits amount) becomes negative. You cannot have negative receipt amounts.

Matching Gifts

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Note: Certain fields, for example Social Security Number and insurance policy number, are masked and encrypted in the database for security purposes. If you see asterisks in this field, you do not have rights to view the data. For more information, consult with your System Administrator.

Some companies match gifts that their employees or corporate partners give to nonprofit organizations. For example, Toy World, Inc. matches employee gifts on a one-to-one ratio when gifts meet certain criteria. Orla McGrann, a Toy World employee, gives your organization $500. Because Toy World matches gifts donated by their employees, you receive an additional $500 gift from Toy World, if Orla McGrann's gift meets the criteria set by Toy World.

When you receive Orla McGrann's gift, you need to create a gift record containing the important information about her gift. From this gift record, you can create a matching gift pledge for Toy World. A matching gift pledge represents a matching gift company's promise to make a donation based on a gift donated by another constituent. When you receive the matching gift from Toy World, you need to add a new matching gift record for Toy World's gift. Then, you can apply this gift record toward Toy World's matching gift pledge to reduce the balance. This chapter explains how to add and apply a payment toward a matching gift pledge.

Frequently Used Terms

This section defines words and phrases you need to know as you work with matching gifts. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Matching gift. A matching gift is donated by any constituent in response to a gift by another constituent. A company may donate a matching gift when one of their employees or corporate partners donates a gift to a nonprofit organization. For example, if a matching gift company's employee donates $100 to your organization, you may receive an additional matching gift from the company. Organizations can also match gifts donated by other organizations. However, an organization cannot match its own gift.

Matched gift. A matched gift is a gift eligible to be matched by a matching gift company. For example, Frank Smith donates $100 to your organization. This $100 gift will be matched evenly by Franks' employer. In this case, Frank's $100 gift is the matched gift and the gift donated by Frank's employer is the matching gift.

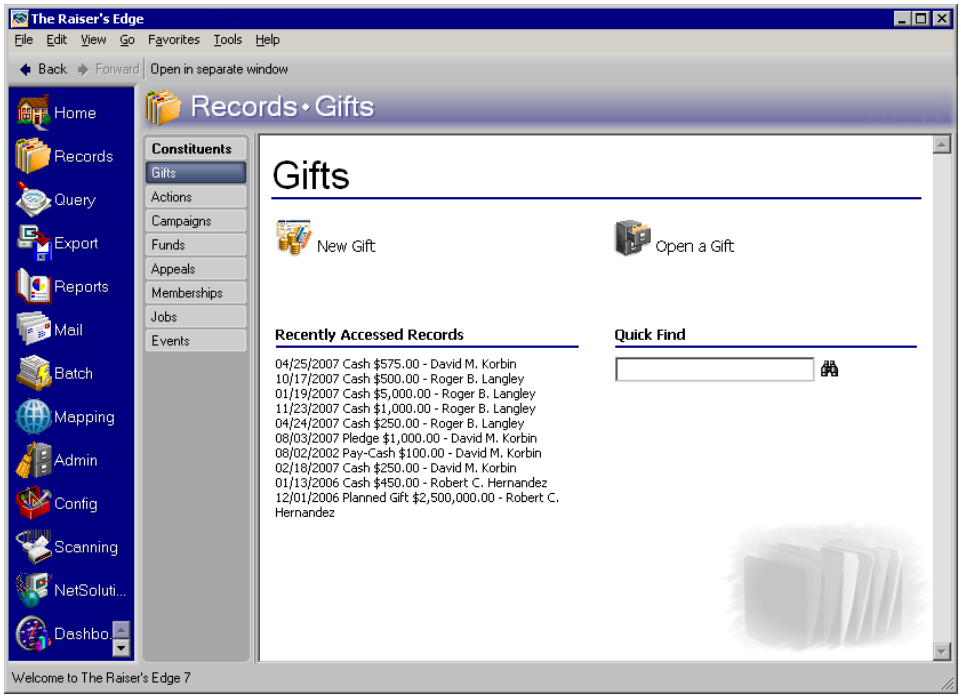
Matching gift pledge. A pledge is a promise to donate a gift. When a matching gift company plans to donate a gift, you can add a matching gift pledge from the Matching Gifts tab of the gift record for the company's matched gift. When you receive the actual gift from the matching gift company, add a new gift record for the matching gift and apply it toward the matching gift pledge to reduce the balance. Matching gift pledges help you track the gifts your organization will receive in the future.

Factor. The matching gift factor is the gift amount the matching gift company will match. For example, a factor of 1 indicates the company matches gifts evenly; an employee gives $100, the company matches the gift with $100. With a factor of 0.5, if an employee gives $100, the company matches the gift with $50.

Matching gift limits. When you mark the **Organization Matches Gifts** checkbox on the Org 1 tab of the matching gift company's constituent record, you can define the minimum and maximum gift the company matches. You can define matching gift limits for each gift eligible to be matched, an annual amount per donor, and a lifetime amount per donor.

Navigating in Gifts

From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, and Other. You can also open existing gift records of any gift type. To add a new matching gift pledge, create a gift record for the gift being matched, then select the Matching Gifts tab on this gift record to add a new matching gift. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



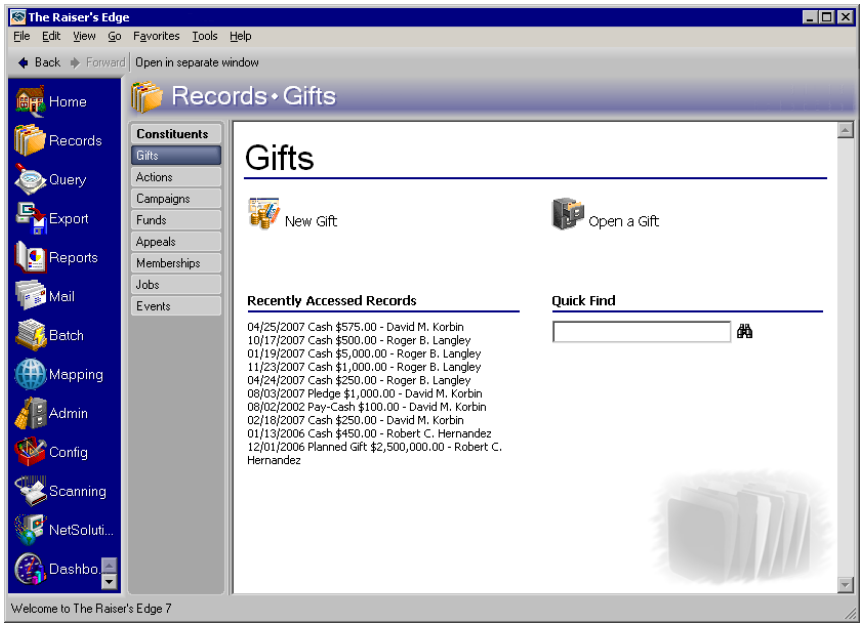
The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing a Matching Gift Record

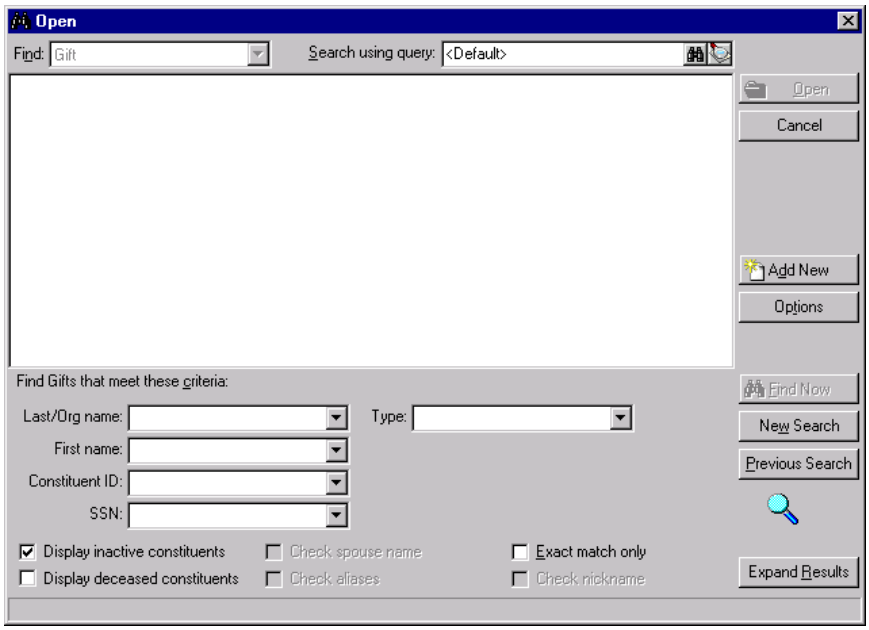
After you create a matching gift pledge, you can open the matching gift record from the Gifts tab of the matching gift company's constituent record. You can also open an existing matching gift record from the Records page or the Matching Gifts tab of the gift record for the matched gift. This section explains how to open a matching gift pledge from the Records page and the Matching Gifts tab of the gift record for the matched gift. For more information about opening gifts displayed on the Gifts tab of a constituent record, see "Accessing a Gift Record" section of the Gift Record chapter.

- **Opening an existing matching gift pledge from the Records page**
  1. On the Raiser's Edge bar, click **Records**.

2. Click the **Gifts** link. The Gifts page appears.

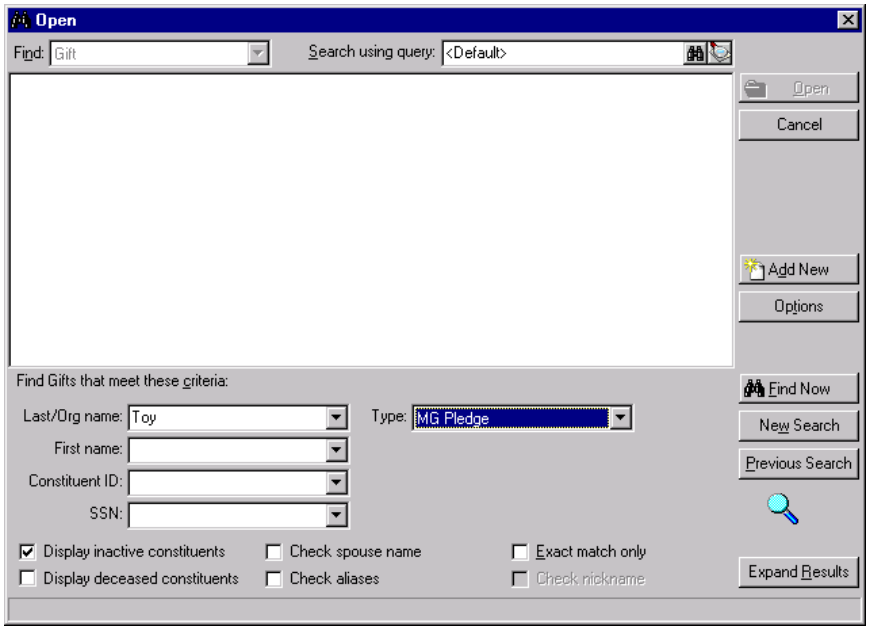


3. Click **Open a Gift**. The Open screen appears so you can search for the gift record you want to open.



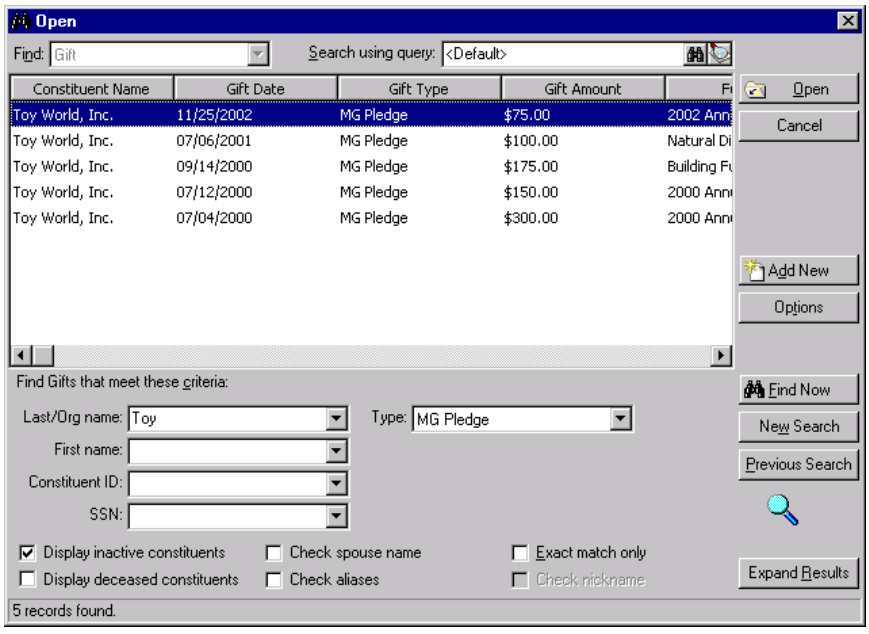
Note: You can enter the first few letters or characters in the criteria fields in **Find Gifts that meet these criteria** frame if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

4. In the **Find Gifts that meet these criteria** frame, decide what criteria you want to use to search for the gift and enter the information in the appropriate fields. You can search by an individual's first or last name, organization name, constituent ID, Social Security Number, and gift type.



Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Adding too much criteria information in the **Find Gifts that meet these criteria** frame can actually prevent you from finding a gift.

5. Click **Find Now**. If the search criteria you entered matches a gift in the database, the gift appears in the grid. More than one gift may appear if the criteria you entered matches multiple gifts.

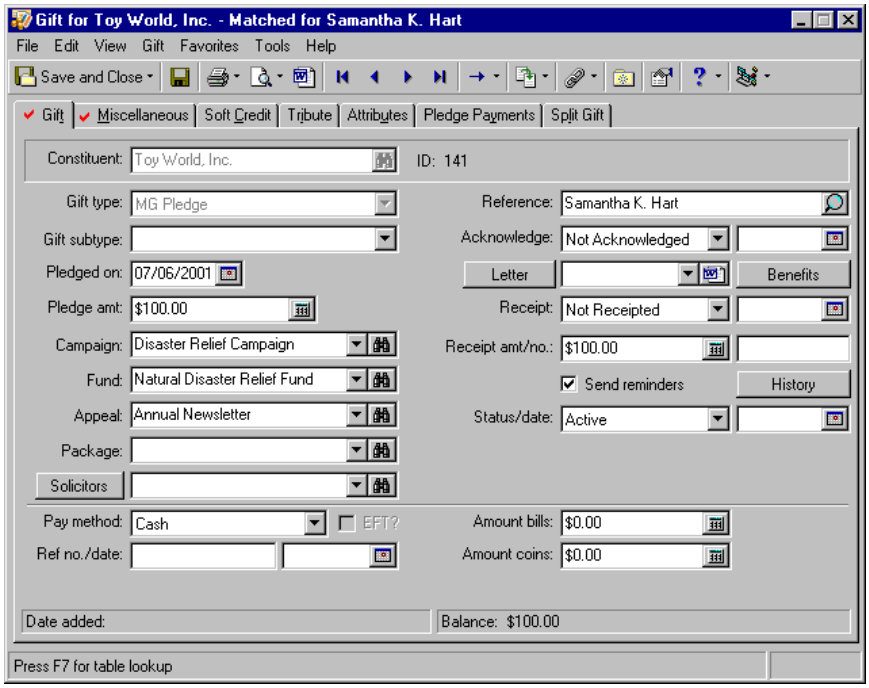


6. In the grid, select the gift record you want to open.

   All the fields, checkboxes, and buttons on the Open screen are discussed in detail in the *Program Basics Guide*.

Note: If the gift has been posted to Blackbaud's ***General Ledger***, some fields on the gift record are disabled. You can change the information on the gift record using the **Adjust** option. For more information, see the Adjusting a Gift section in the Gift Record chapter.

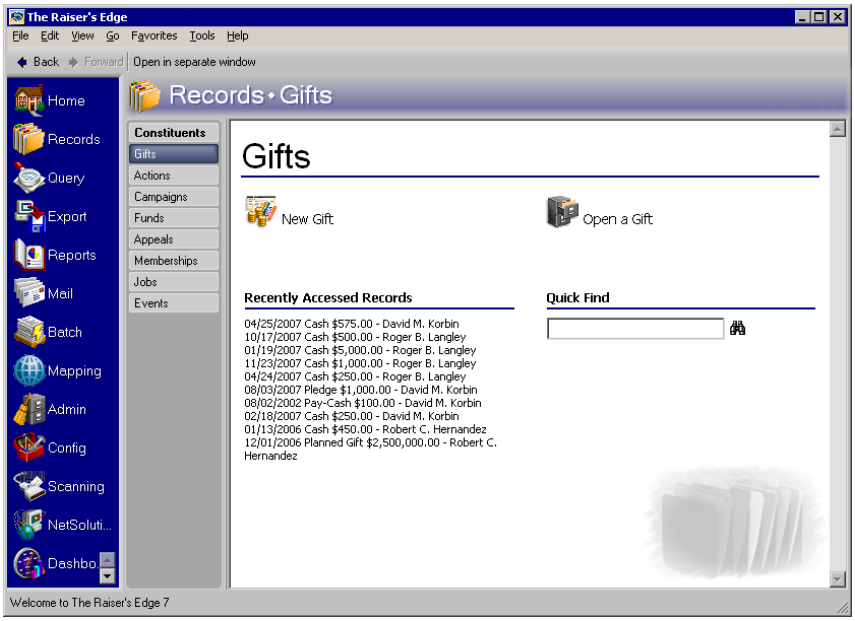
7. Click **Open**. The gift record appears.



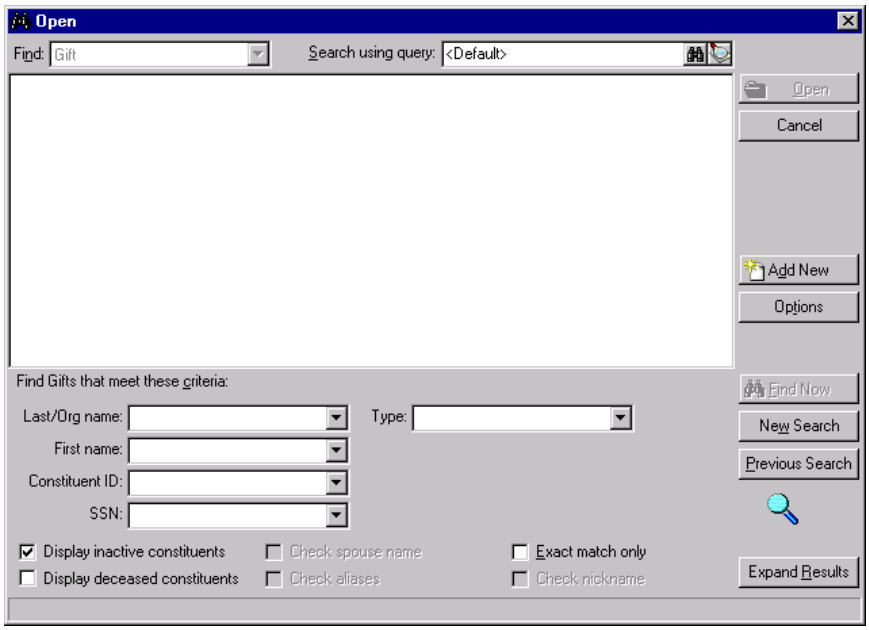
8. After you enter or edit the appropriate information, click **Save and Close** on the toolbar.

Opening an existing matching gift pledge from the gift record of the matched gift

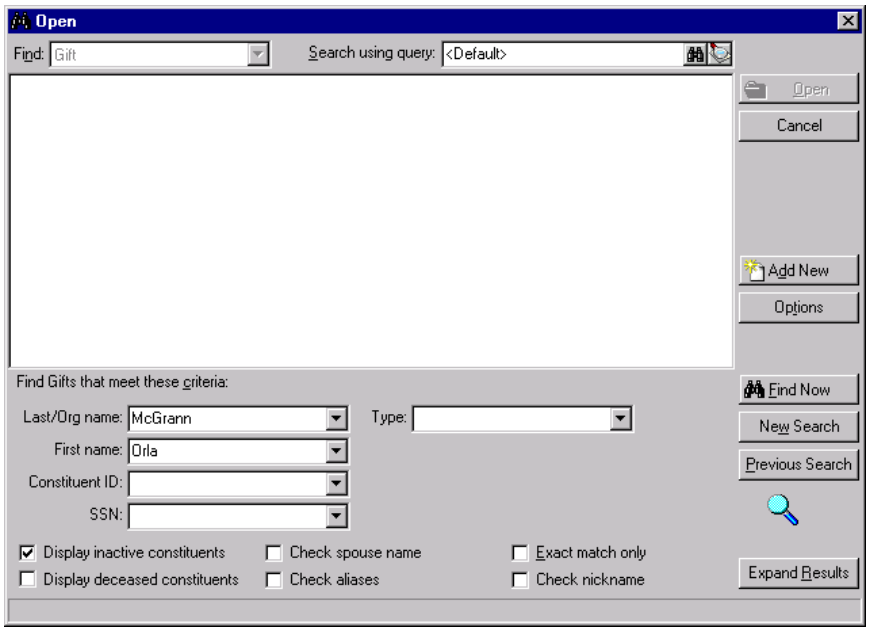
1. On the Raiser's Edge bar, click **Records**.
2. Click the **Gifts** link. The Gifts page appears.



3. Click **Open a Gift**. The Open screen appears so you can search for the gift record you want to open.

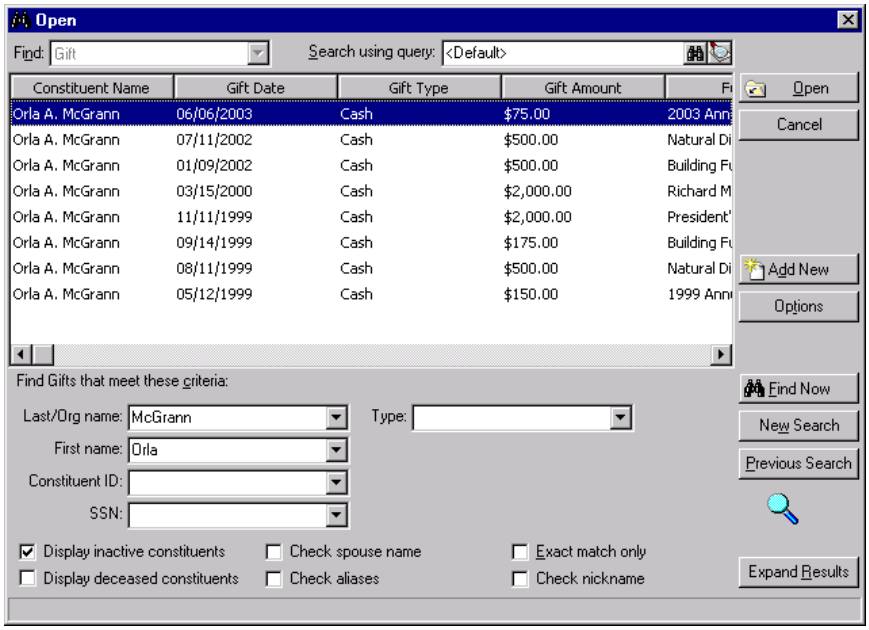


4. In the **Find Gifts that meet these criteria** frame, decide what criteria you want to use to search for the gift and enter the information in the appropriate fields. You can search by an individual's first or last name, organization name, constituent ID, Social Security Number, and gift type. For example, if Orla McGrann donates a gift of $100 that is being matched by Toy World, search for the gift record for Orla McGrann's $100 gift.



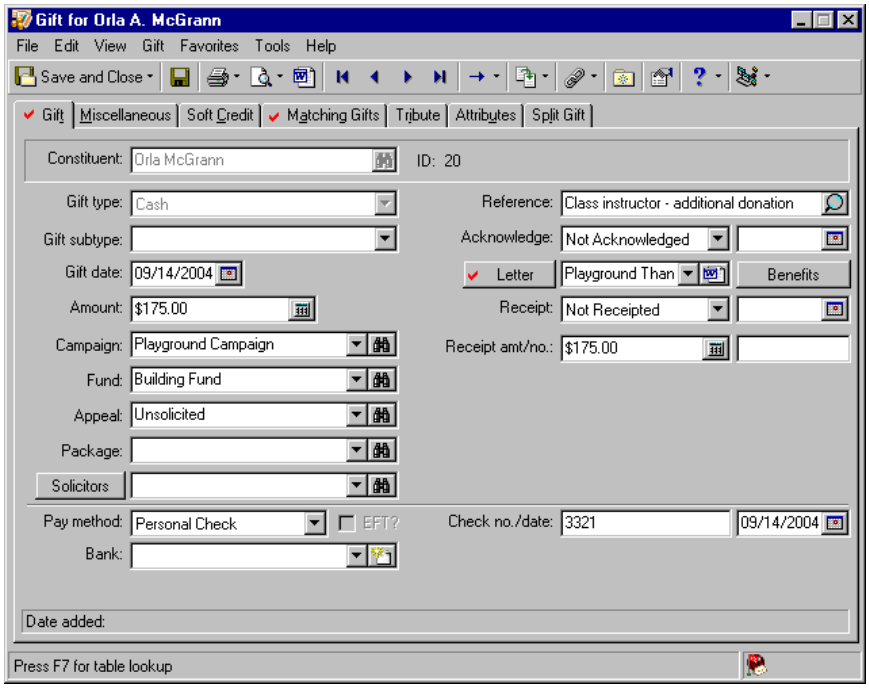
Note: You can enter the first few letters or characters in the criteria fields in **Find Gifts that meet these criteria** frame if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

5. Click **Find Now**. If the search criteria you entered matches a gift in the database, the gift appears in the grid. More than one gift may appear if the criteria you entered matches multiple gifts.

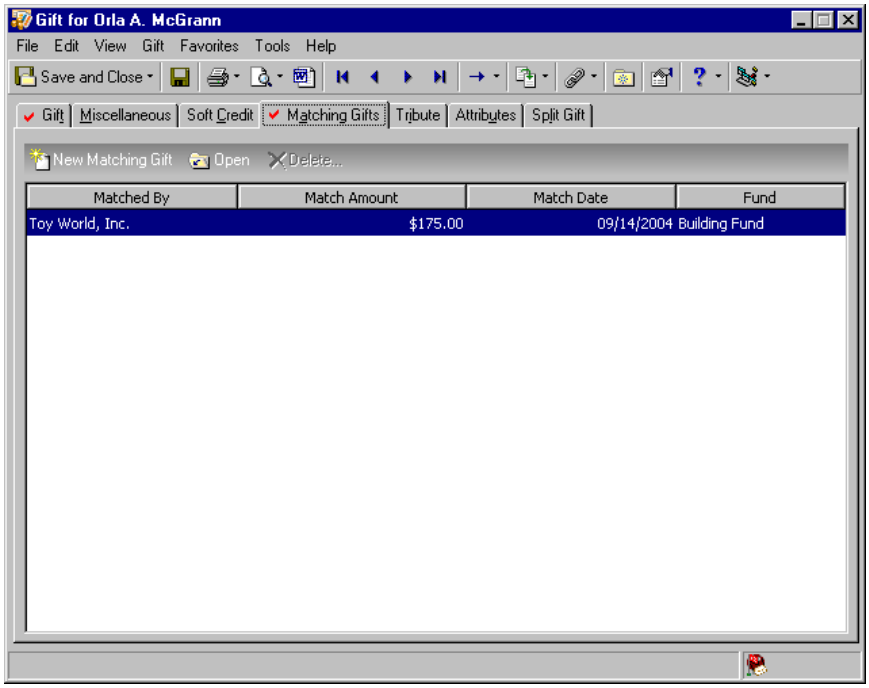


Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Adding too much criteria information in the **Find Gifts that meet these criteria** frame can actually prevent you from finding a gift.

6. In the grid, select the gift you want to open.
7. Click **Open**. The gift record appears.



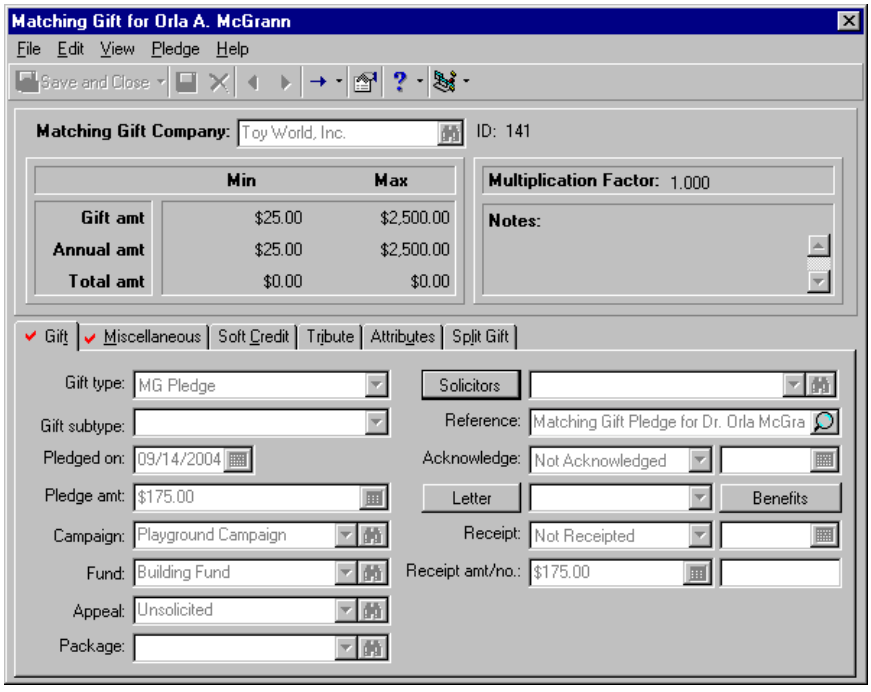
8. Select the Matching Gifts tab.



9. In the grid, select the matching gift pledge you want to open.

Note: If the gift has been posted to Blackbaud's ***General Ledger***, some fields on the gift record are disabled. You can change the information on the gift record using the **Adjust** option. For more information, see the Adjusting a Gift section of the Gift Record chapter.

10. Click **Open**. The matching gift pledge record appears.



11. You can view or edit the information on the matching gift record.

12. Click **Save and Close** on the toolbar. You return to the Matching Gifts tab of the gift record for the matched gift.
13. Click **Save and Close** on the toolbar to close the gift record for the matched gift.

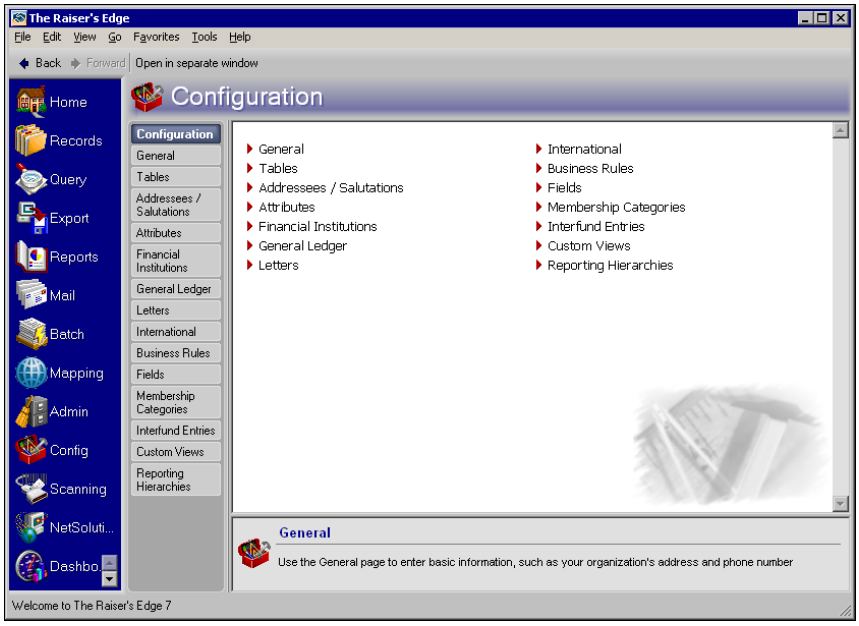
Matching Gift Business Rules

Business rules are ways for you to control certain functions and displays throughout ***The Raiser's Edge***. Unlike user options, business rules affect all users of the program, not just your user name. Two business rules are specific to matching gift pledges. When you create reports, mailings, queries, or exports, you can decide whether the constituent who donated the matched gift, the matching gift company, or both should receive default credit for a matching gift pledge. Also, when you add a soft credit to the Soft Credit tab of the gift record for the matched gift, you can set a business rule to automatically copy the soft credits to the matching gift pledge record.

Defining business rules for matching gifts

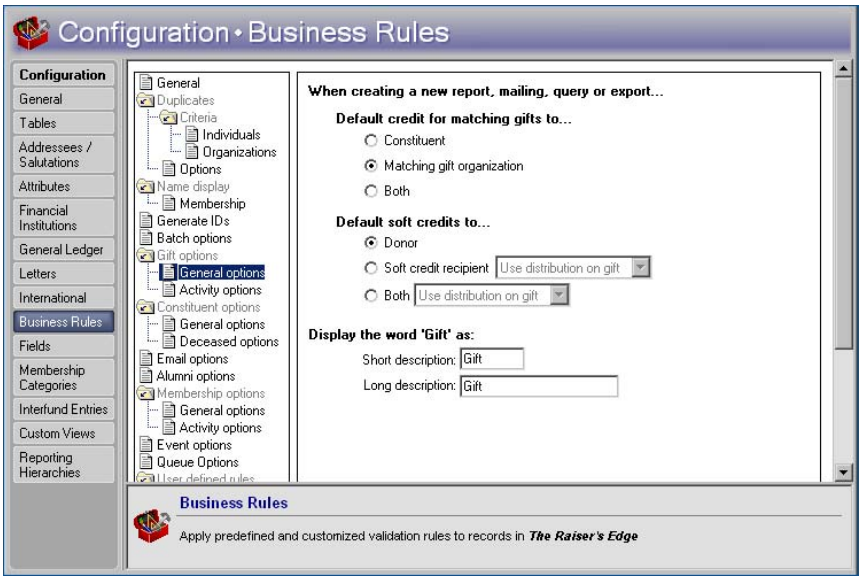
Warning: To define business rules, you must have supervisor security rights. For more information about security, see the Security chapter of the *Configuration & Security Guide*.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

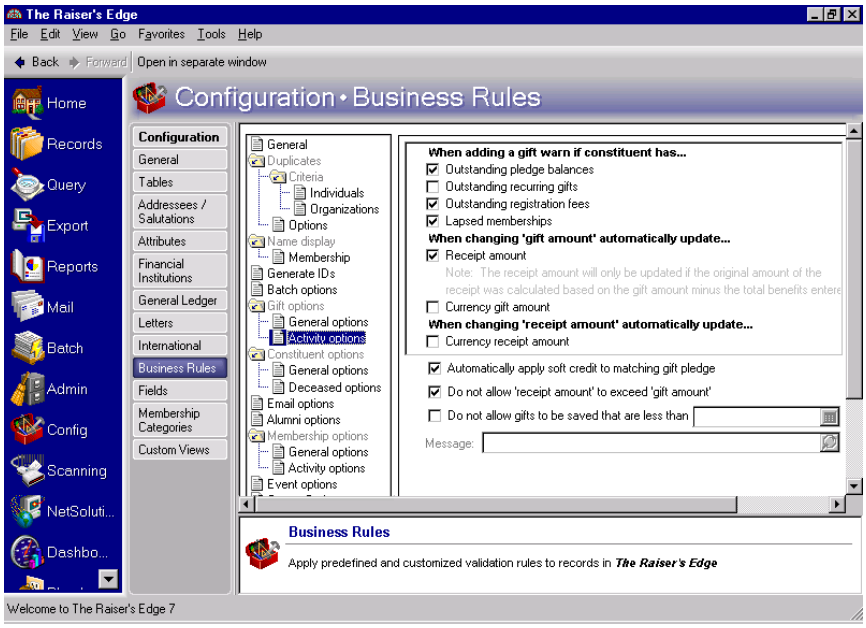


2. Click the **Business Rules** link. The Business Rules page appears.

3. From the tree view on the left, select **General options** from the **Gift options** folder. The Business Rules page now appears with gift-related options.



4. Under **When creating a new report, mailings, query or export** frame, select whether to give default credit to the constituent who donated the matched gift, the matching gift company, or both.
5. From the tree view on the left side of the screen, select **Activity options** in the **Gift options** folder. The Business Rules page now appears with more gift-related options.

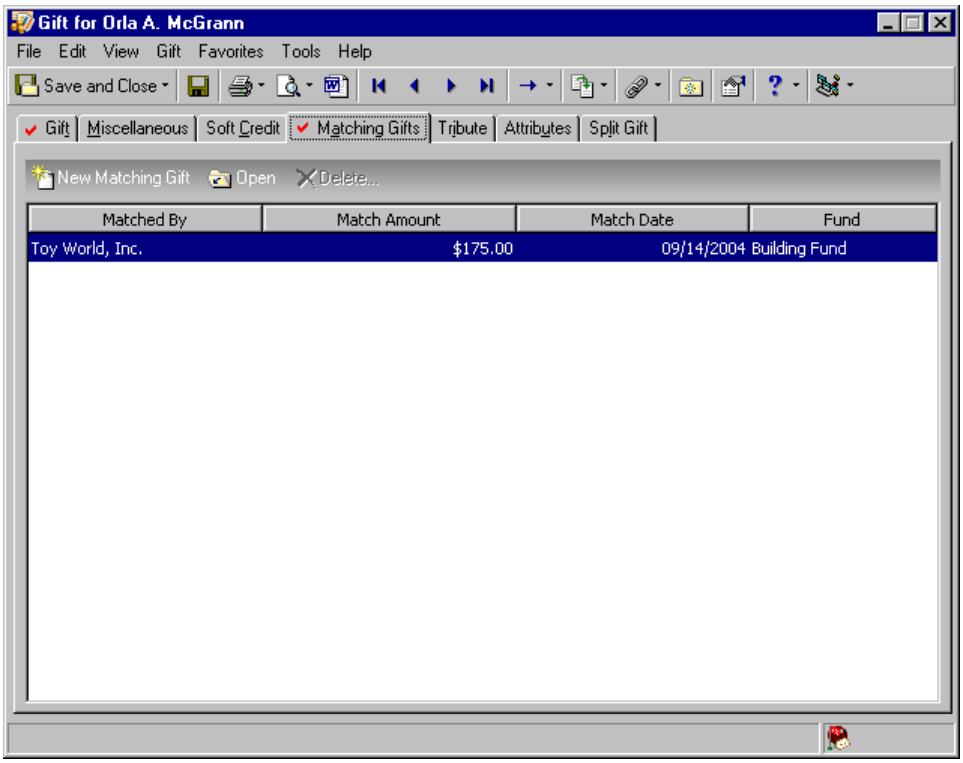


6. To automatically copy soft credits from the gift record of the matched gift to the matching gift pledge record, mark the **Automatically apply soft credit to matching gift pledge** checkbox. For example, if Larry Smith was soft credited on the gift record for the matched gift, the program automatically soft credits Larry Smith on the matching gift pledge record if you mark this checkbox.
7. After you make changes to business rules, your preferences are updated right away.

Matching Gifts Tab on a Gift Record

Note: When an organization matches a gift, you should track the gift as a matching gift pledge until you receive the gift. If you track the matching gift as a regular pledge, the program does not link the matching gift to the gift being matched.

The Matching Gifts tab on a gift record displays matching gift pledges for the gift represented by the gift record. If a gift is eligible to be matched, you can add a new matching gift pledge and edit and view existing matching gift pledges from this tab. If you have not yet saved the gift record, you can also delete unwanted matching gift pledges using this tab. After you save the gift record, you can delete a matching gift pledge from the Gifts tab of the constituent record for the constituent donating the matching gift pledge.



When you add a gift for a constituent whose business or spouse's business matches gifts, the program can automatically create a matching gift pledge for the business entered on the Matching Gifts tab of the donor's gift record. For example, Sarah Thomas works for a company called Toy World. Toy World matches many of their employee's gifts and is entered as Sarah's current employer on her constituent record. When Sarah donates a gift to your organization, the program automatically adds a matching gift pledge for Toy World on the Matching Gifts tab of Sarah's gift record. Organizations can also match gifts donated by other organizations. However, an organization cannot match its own gift.

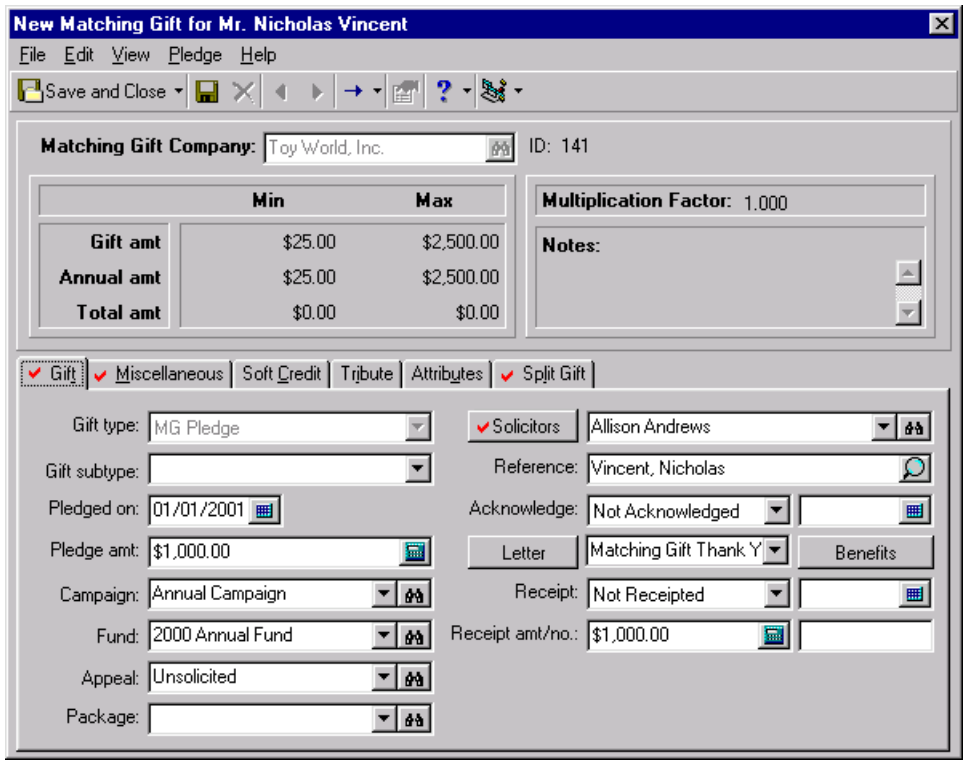
For the program to automatically add a matching gift pledge to a gift record, you must add the matching gift company to the donor's constituent record using the **Business** button. Also, the matching gift company must have an organization constituent record with the **Organization Matches Gifts** checkbox marked on the Org 1 tab of the constituent record.

Note: When you delete a matching gift pledge from the Matching Gifts tab, the program removes the pledge from the database so you do not expect the gift as income. Deleting a matching gift does not change the matching gift information entered on the Org 1 tab of the matching gift company's constituent record.

If you do not open the matching gift record for Toy World before you save and close Sarah's gift, the program opens the matching gift pledge so you can add and verify information on the record. If you do not want Toy World to match Sarah's gift, close Toy World's matching gift pledge record without saving or close the record and delete the matching gift pledge from the Matching Gifts tab on Sarah's gift record.

Understanding the Matching Gift Pledge Record

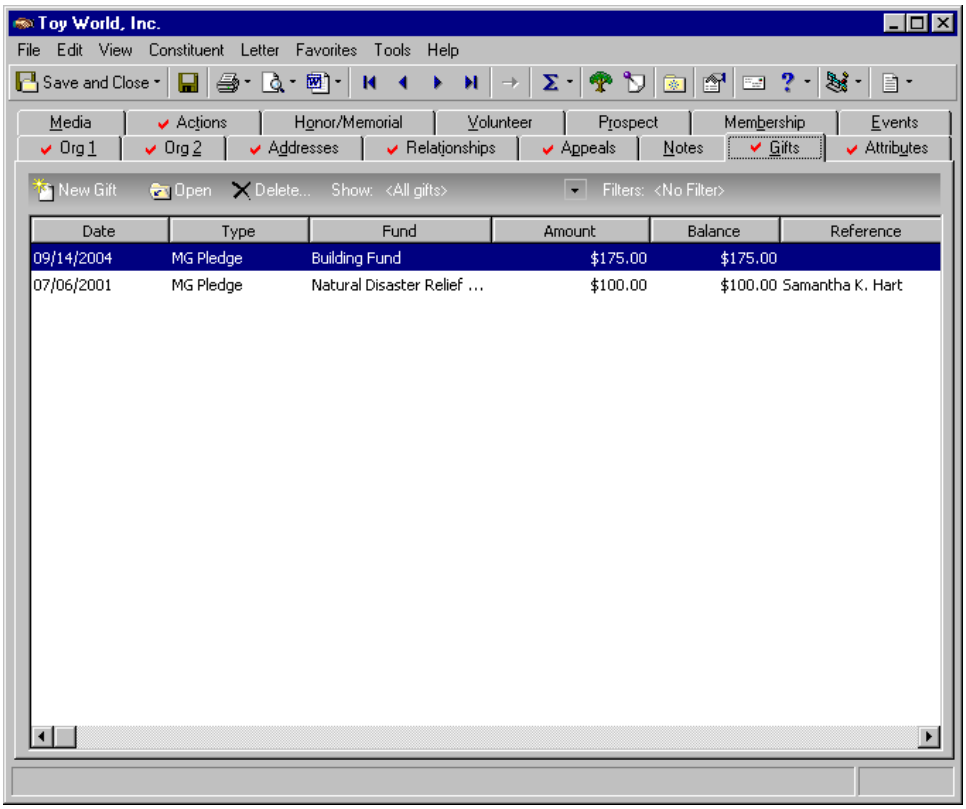
When you add a matching gift pledge, you are creating a gift record with the gift type of MG Pledge. This gift type is available only when you add a matching gift pledge from the Matching Gifts tab of a gift record. To add a new matching gift pledge, click **New Matching Gift** on the Matching Gifts tab of a gift record. The New Matching Gift screen appears.



Note: The Tribute tab is available only if you use the optional module *Honor/Memorial Tracking*. For more information about tribute gifts, see the *Tribute Gifts Guide*.

The top half of the New Matching Gift screen displays the name of the matching gift company, the limits to which the company will match a gift, the multiplication factor, and any notes related to how the company matches gifts. The limits, multiplication factor, and notes are only for information purposes and can be edited from the Org 1 tab of the matching gift company's constituent record. The lower portion of the New Matching Gift screen contains the gift record, which is divided into the Gift, Miscellaneous, Soft Credit, Tribute, Attributes, and Split Gift tabs. These tabs are similar to the corresponding tabs on a gift record.

After you create a matching gift pledge for a company, the program displays the matching gift pledge on the Gifts tab of the matching gift company's constituent record.



Note: The matching gift pledge is also displayed on the Gifts tab for the constituent whose gift is being matched. For more information about opening, editing, and deleting a record from the Gifts tab of a constituent record, see the Gift Record chapter.

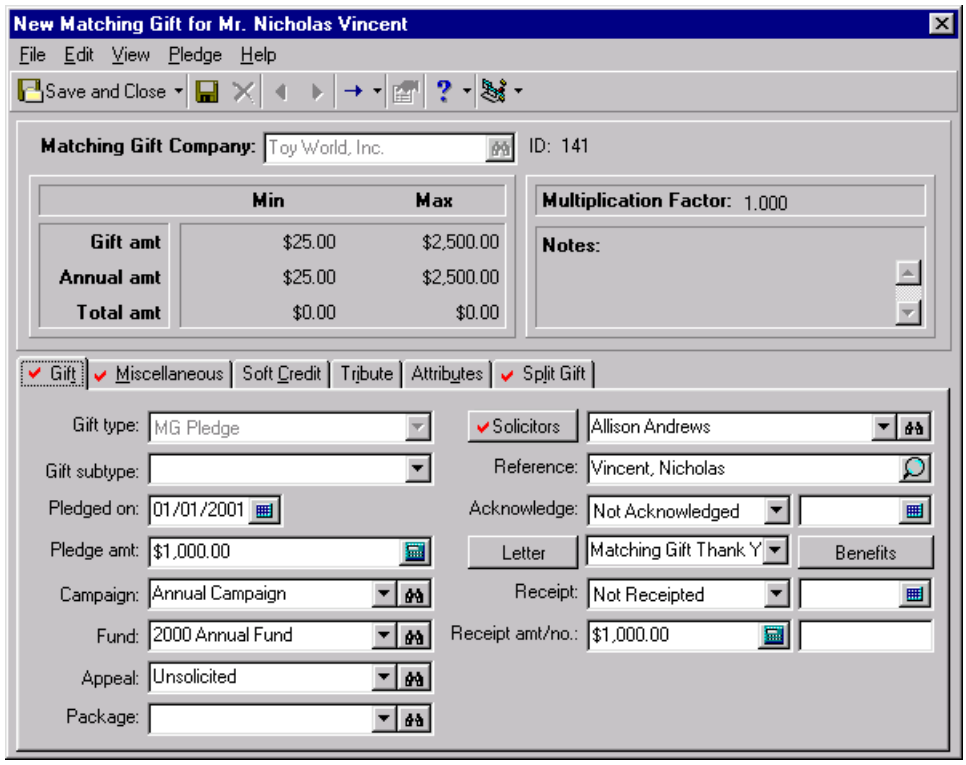
From the Gifts tab of the matching gift company's constituent record, you can open, edit, and delete the matching gift pledge following the same procedures you use for other gift types on a gift record.

When you add or edit a matching gift pledge from the Matching Gifts tab, the program displays details concerning the limits and multiplication factor to which the company matches gifts. If you open a gift record for a matching gift pledge from the Gifts tab of the matching gift company's constituent record, the program does not display this information on the gift record. The next sections explain each tab available on a matching gift pledge record.

Gift Tab

Note: The matching gift pledge record does not contain payment method information because a pledge does not represent an actual gift. Instead, it represents a promise for a future gift.

The Gift tab contains key gift information, including the name of the matching gift company that donated the matching gift, the amount of the gift, and the fund to which the matching gift is designated.

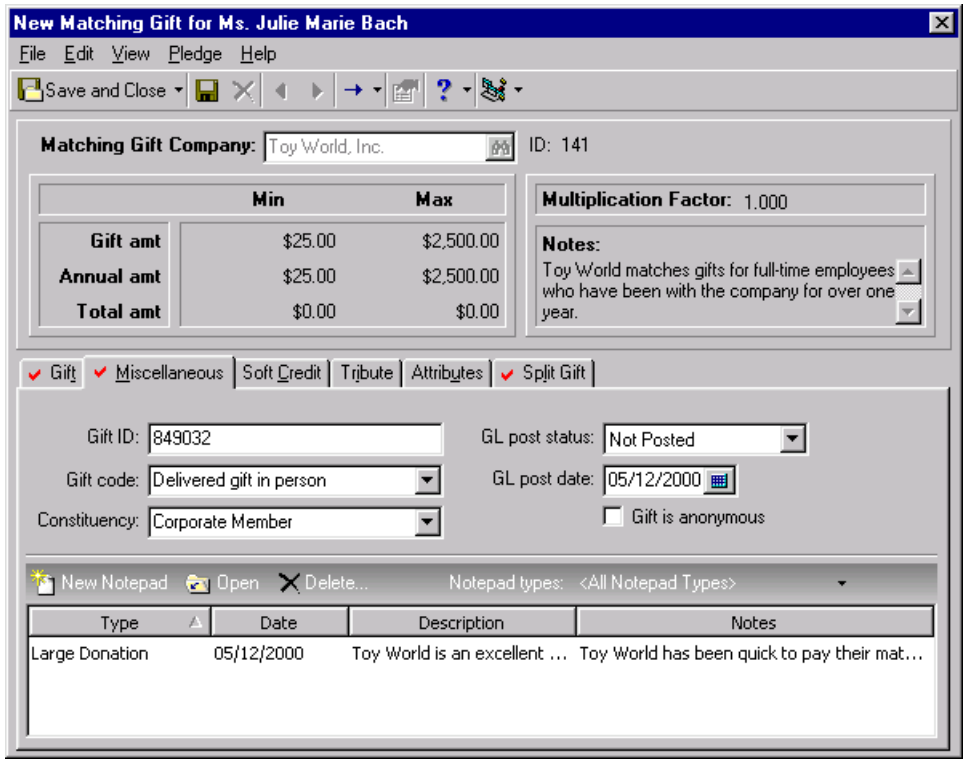


The Gift tab on a matching gift pledge contains the same fields and options as the Gift tab for any other gift type. For specific information about available fields and options, see the Gift Tab section of the Gift Record chapter.

Miscellaneous Tab

Note: If “Posted” or “Do Not Post” does not appear in the **GL post status** field, you do not have security rights to select these options. If you want to select one of these options, see your Supervisor. For more information about security, see the *Configuration & Security Guide*.

You can record the same type of information on the Miscellaneous Tab of a matching gift record as you can on the Miscellaneous tab of any other gift record. You can assign a gift ID, constituent code, and gift code to the matching gift pledge. Also, you can record the posting status and notes for the pledge gift.

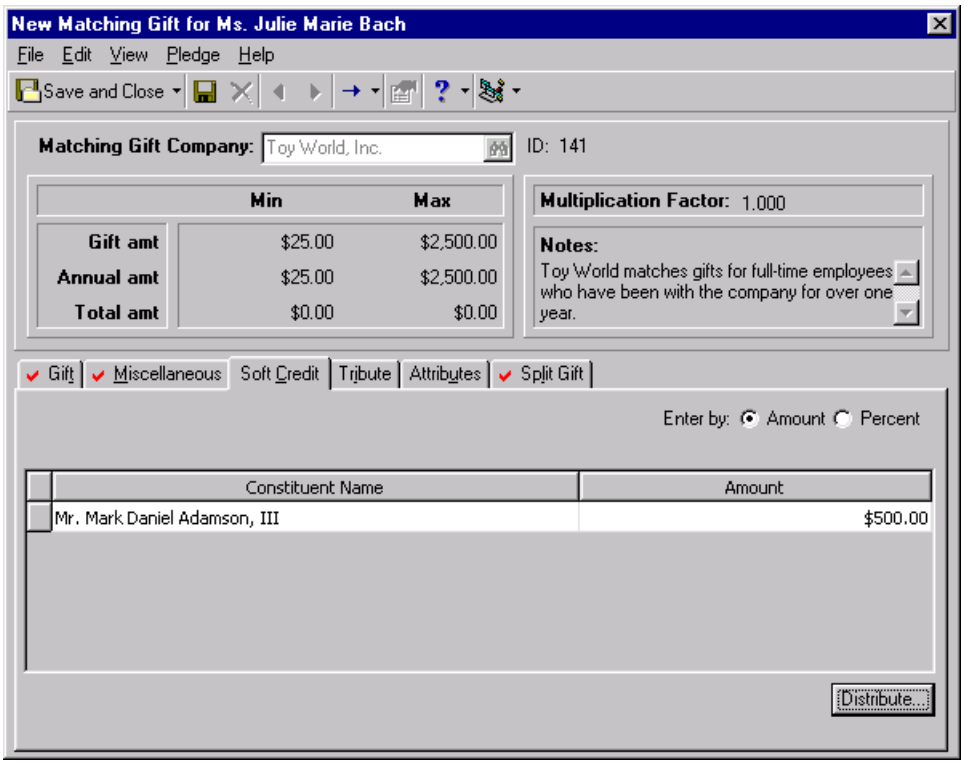


For more information about these fields and options, see the Miscellaneous Tab section of the Gift Record chapter.

Soft Credit Tab

A soft credit allows more than one constituent to share credit for a single gift. For matching gift pledges, you may want to soft credit an organization's contact so you can provide benefits to the contact when the matching gift organization reaches a specific giving level. When you soft credit constituents for a gift, you can decide whether to split the credit evenly among all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution.

You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in the database. You cannot soft credit the donor of the matched gift on the matching gift pledge. For example, if Jane Smith donates a gift that is matched by her employer, you cannot soft credit Jane Smith on her employer's matching gift pledge record. When you create reports and mailings, you can determine whether the donor, the soft credit recipient, or both should receive credit for the gift in the mailing or report. The soft credit distribution you select for the report or mailing does not affect the information entered on the Soft Credit tab of the matching gift pledge record.



To soft credit a constituent for a matching gift pledge, use the same procedure as for a regular gift record. For more information, see "Soft Credit Tab" on page 58.

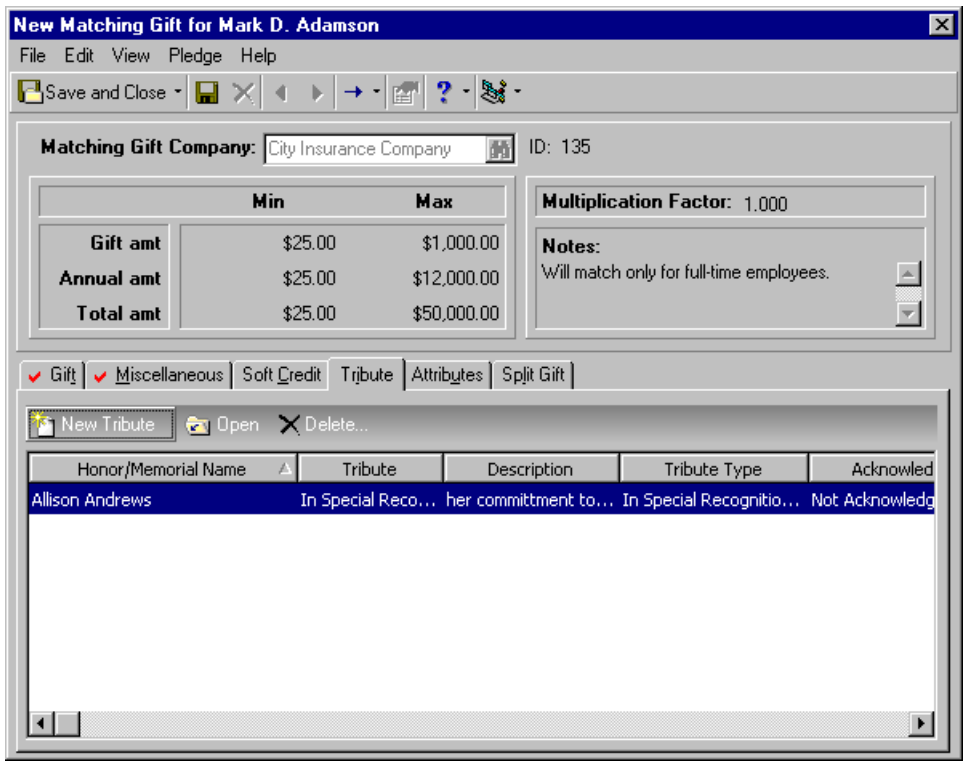
Automatically Applying Soft Credits

In *Configuration*, you can set a business rule to automatically copy soft credits from the Soft Credit tab of a gift record to the Soft Credit tab of the matching gift pledge record when you save the gift record. For example, if Frederick Thompson is a soft credit for the full amount of the matched gift on Michael Simpson's record, the program can automatically add Frederick to the Soft Credit tab of the matching gift pledge when you save the matched gift. After Frederick's name appears on the Soft Credit tab of the matching gift record, you can change the soft credit distribution, as necessary. For more information about setting this business rule, see "Matching Gift Business Rules" on page 256.

Tribute Tab

Warning: Before you begin adding tribute gifts, you must set up the tribute on the Honor/Memorial tab of the honoree's constituent record. For information about creating a new tribute, see the Tribute chapter of the *Tribute Data Entry Guide*.

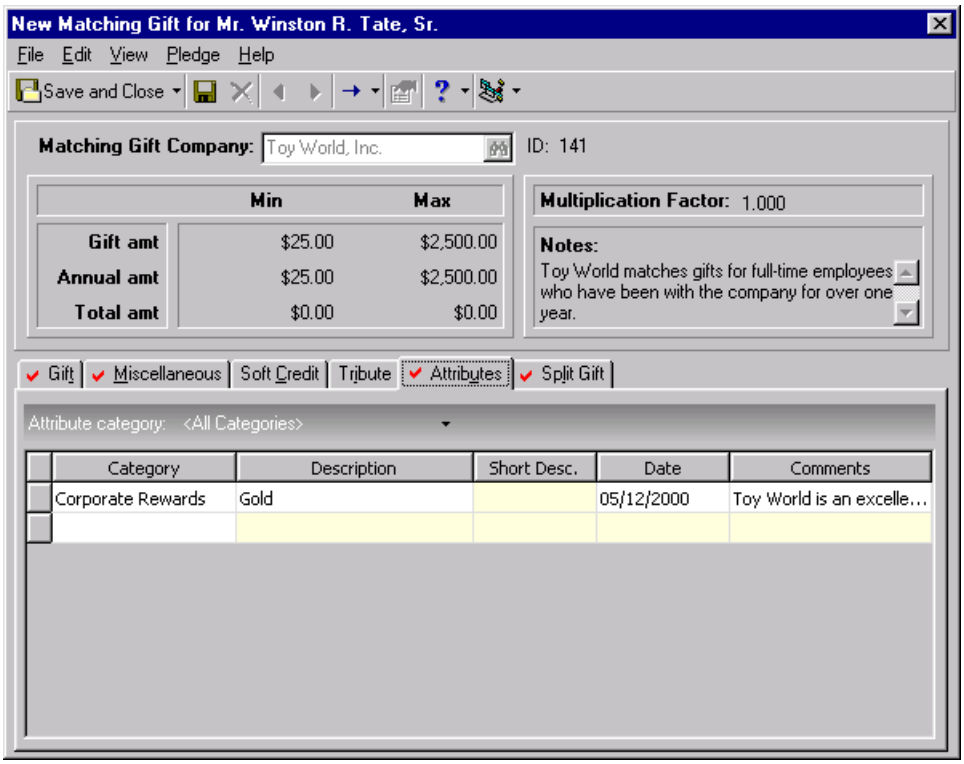
If you have the optional module *Honor/Memorial Tracking*, you can track detailed information about donations given in honor, memory, or celebration of an individual or organization. With *Honor/Memorial Tracking*, you can use the Tribute tab on a gift record to apply a gift to a tribute. A tribute explains the reason gifts are being donated to your organization on behalf of an honor/memorial constituent.



For information about designating a gift to an honor/memorial constituent, see the *Tribute Gifts Guide*.

Attributes Tab

Throughout ***The Raiser's Edge***, you can add attributes to track information specific to your organization. On a matching gift pledge record, you can use the Attributes tab to store additional information about a matching gift pledge. For example, if you have a Corporate Rewards program that gives benefits to matching gift companies according to their level of giving, you can add an attribute with a category called Corporate Rewards to the matching gift pledge record. Within the Corporate Rewards category, you can create descriptions called Gold, Silver, and Bronze to describe the different levels of giving. Later, you can create a query to locate all corporate contributors with a certain giving level.

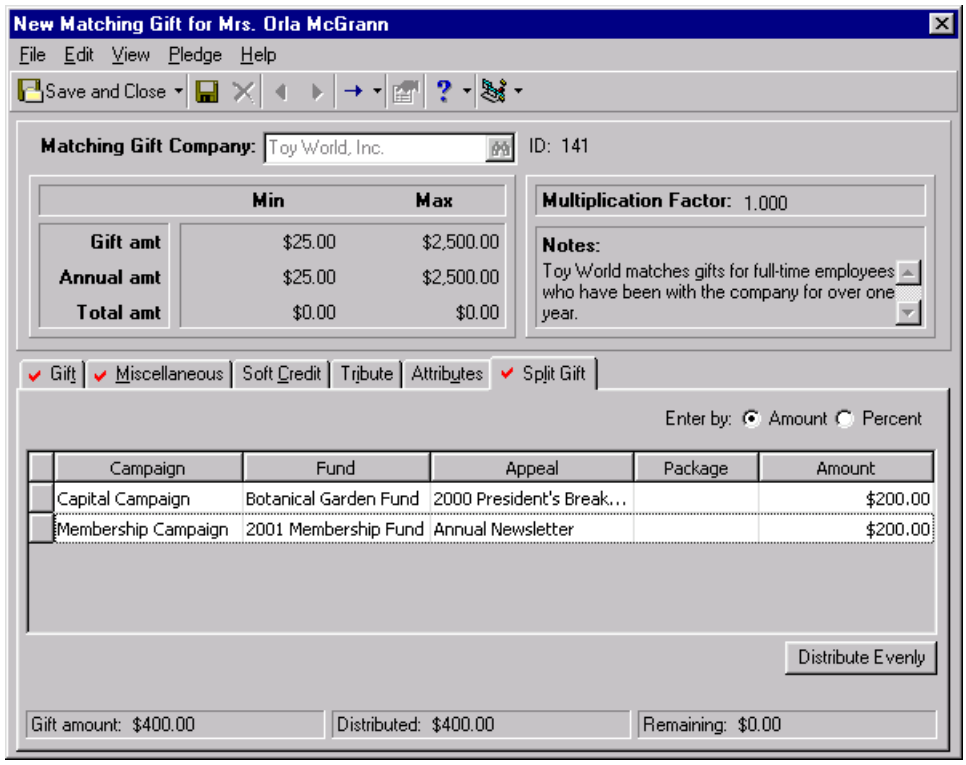


To add matching gift attributes, use the same method to add an attribute on a constituent record. For more information about adding an attribute, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*.

Split Gift Tab

On the Split Gift tab, you can divide a gift among multiple campaigns, funds, appeals, or packages. When you split a gift, the program displays the campaigns, funds, appeals, and packages entered on the Split Gift tab in the corresponding fields on the Gift tab. Then, the program disables the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab. When splitting a gift, you need to edit the campaign, fund, appeal, and package information on the Split Gift tab.

If you split a gift being matched, the program defaults the campaign, fund, appeal, and package distribution specified on the Split Gift tab of the gift record to the Split Gift tab of the matching gift pledge record.

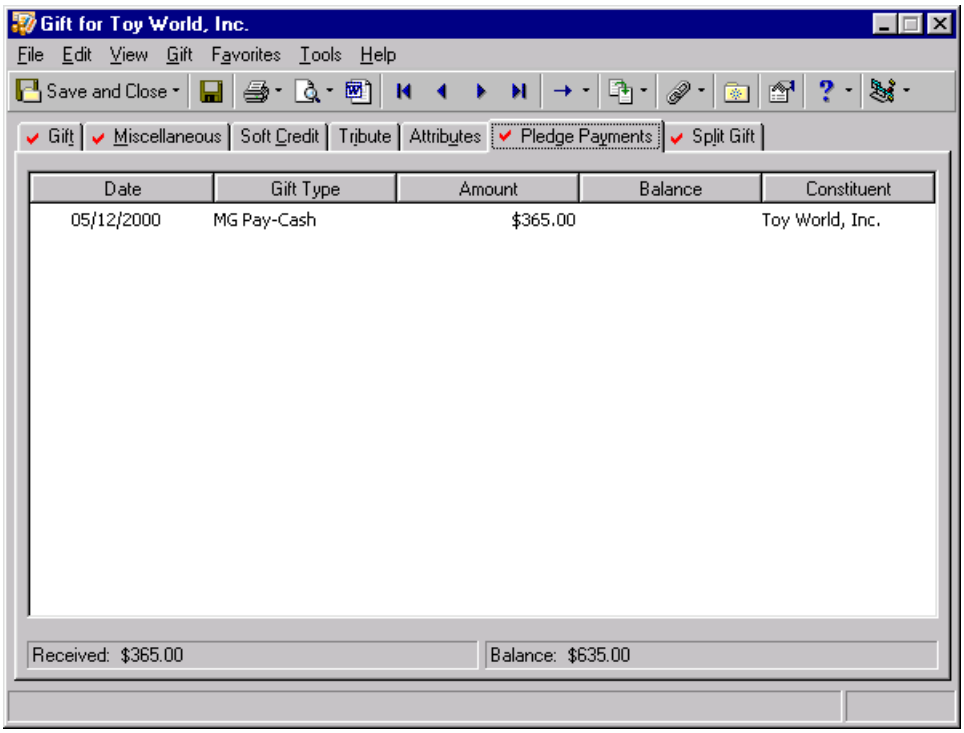


The program calculates the amount or percentage by which the gift should be split based on the distribution entered on the Split Gift tab on the gift record for the matched gift. You can modify the distribution of the campaign, fund, appeal, and package on the Soft Credit tab of the matching gift pledge, as necessary.

You can split a matching gift pledge using the same method used to split a gift on a gift record. For more information about dividing a gift among multiple campaigns, funds, appeals, and packages, see the Split Gift Tab section of the Gift Record chapter of this book.

Pledge Payments Tab

When you open a gift record for a matching gift pledge from the Records page or the Gifts tab of the matching gift company's constituent record, the Pledge Payments tab appears on the gift record for the matching gift pledge.



The grid displays all the pledge payments that have been applied toward this matching gift pledge. You can open the gift records for the pledge payments from the Gifts tab of the matching gift company's constituent record or the Gifts page of ***The Raiser's Edge***.

Managing Matching Gift Pledges

Now that you understand the tabs and options on a matching gift pledge record, you can add a matching gift pledge to the database. This section explains how to add, pay, and delete matching gift pledges from the database.

Adding a Matching Gift Pledge

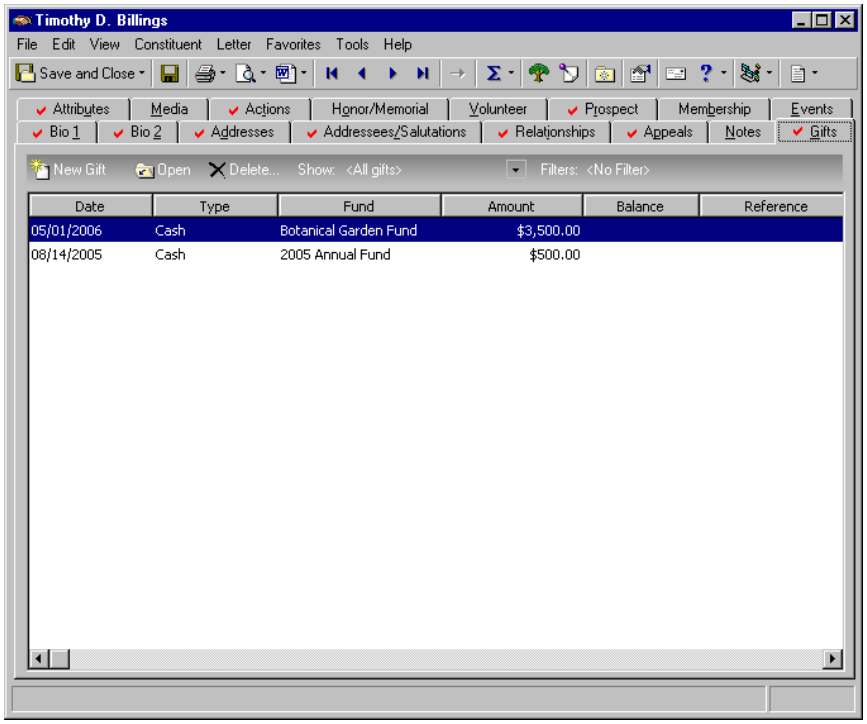
When a company agrees to match a gift, you need to add a matching gift pledge record to the database. To add a matching gift pledge, you need to open the gift record for the matched gift and select the Matching Gifts tab. From this tab, you can add new matching gifts.

Adding a matching gift

Scenario: Because of your Annual Fund solicitations, Toy World pledges to donate a matching gift for every person who donated a gift of $1,000 or more. On 09/12/2006, Timothy Billings calls and agrees to donate $1,000. Now you need to create a gift record for Timothy's gift and add Toy World's matching gift pledge on the Matching Gifts tab of Timothy's gift record.

Warning: Before you add a matching gift pledge, the organization or company matching the gift must have a constituent record in the database and the **Organization Matches Gifts** checkbox on the Org 1 tab of the constituent record must be marked. For more information about this checkbox, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

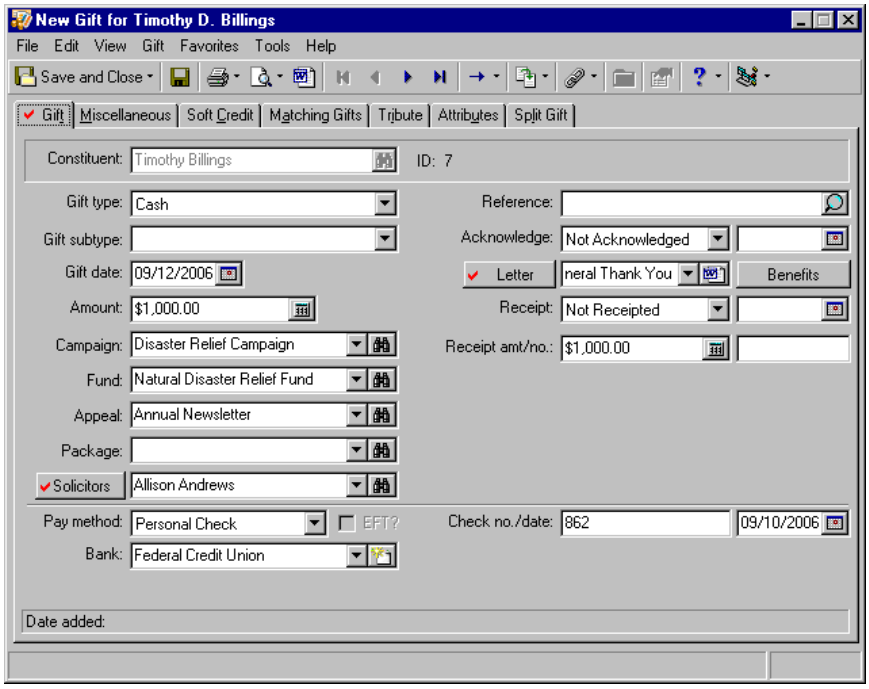
1. From Timothy Billings's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



2. On the action bar, click **New Gift**.

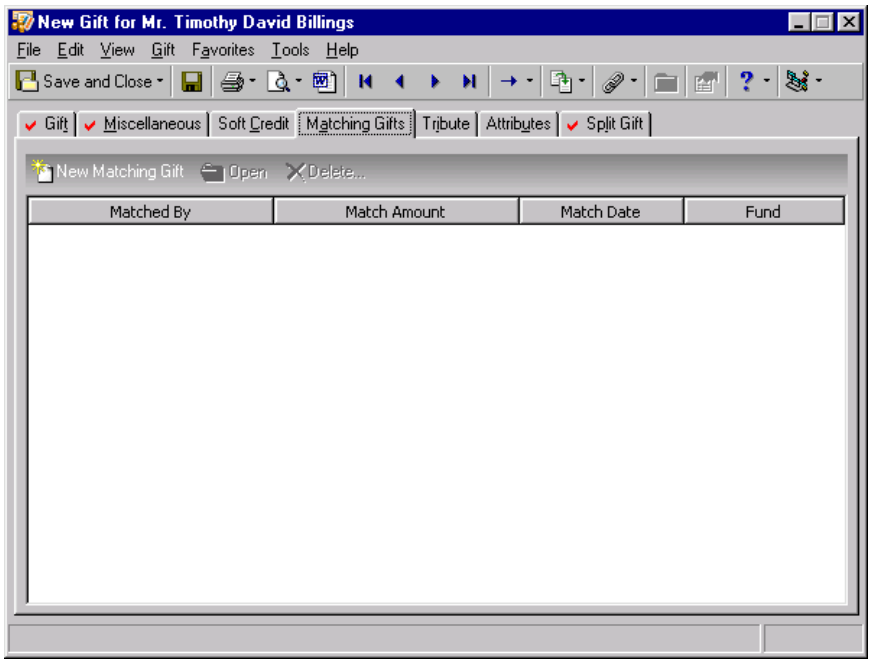
Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

3. From the New Gift screen, select the Gift tab and add the information about Timothy's gift as shown on the screen below. For more information about adding a gift record, see "Adding a Cash gift" on page 68.

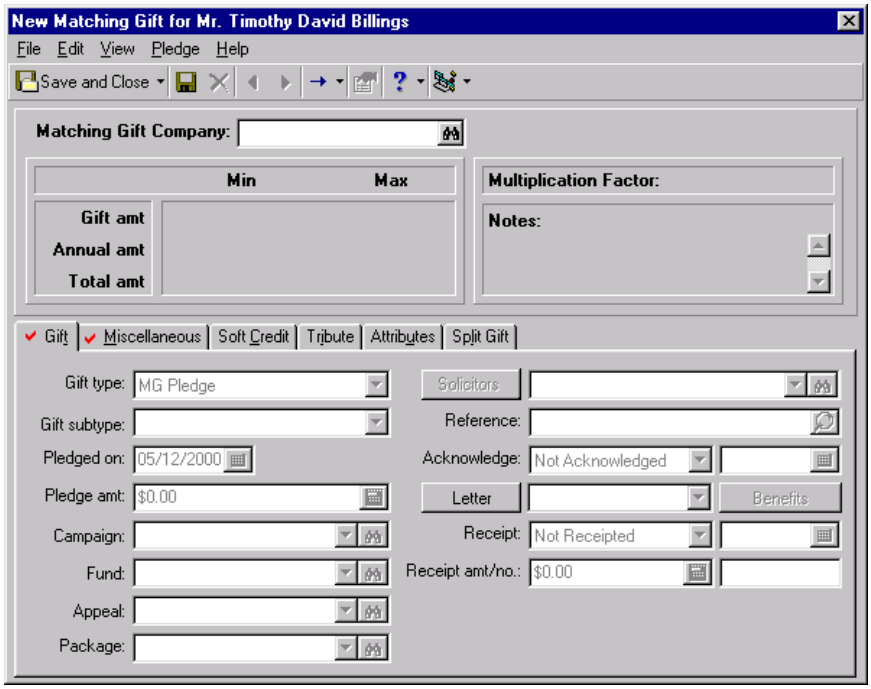


Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

4. To add Toy World's matching gift pledge, select the Matching Gifts tab.

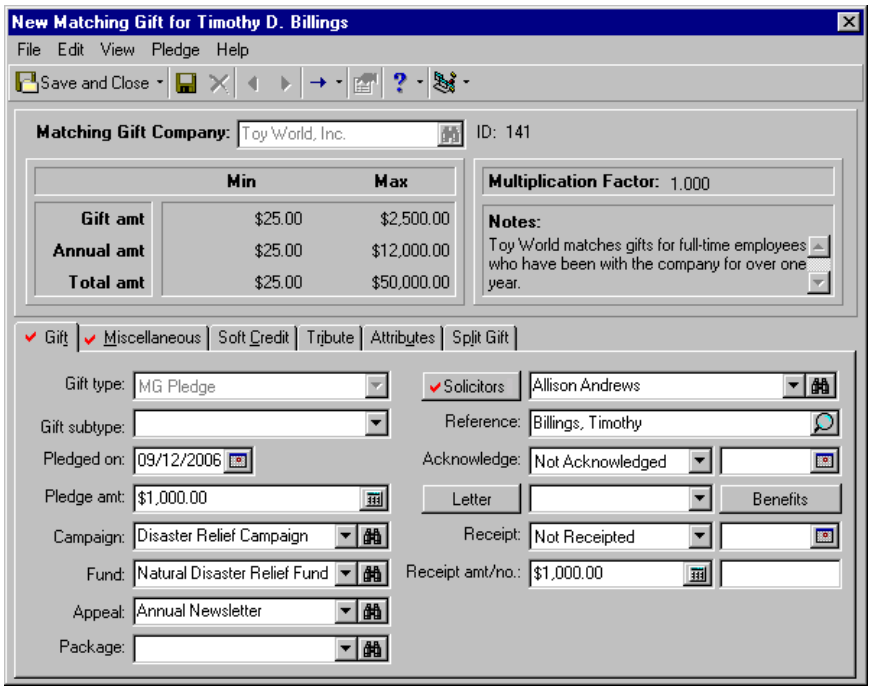


5. On the action bar, click **New Matching Gift**. The New Matching Gift screen appears. All fields on the New Matching Gift screen are disabled until you enter the name of the company donating the matching gift.



Note: After selecting a company in the **Matching Gift Company** field, you can open the matching gift company's constituent record by selecting **Pledge**, **Go to** from the menu bar. When the sub menu appears, select the name of the matching gift company.

6. In the **Matching Gift Company** field, click the binoculars to search for Toy World, Inc. After you locate and select Toy World, the name appears in the **Matching Gift Company** field. After you enter a company name on the matching gift pledge record, the program disables the **Matching Gift Company** field and displays the matching gift factor and limits for Toy World. This information is recorded on the Org 1 tab of Toy World's constituent record.



Note: To change the name of the company donating the matching gift, close this matching gift record without saving the changes and create a new matching gift record.

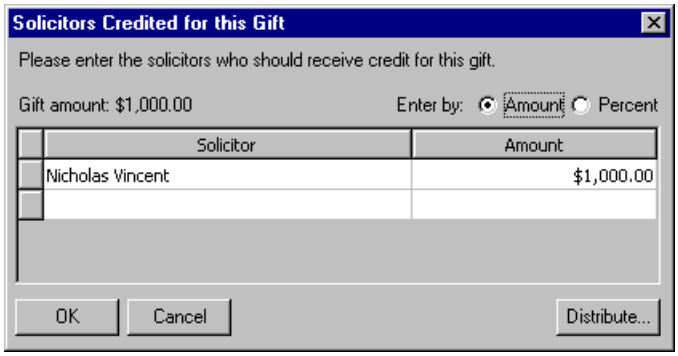
7. In the **Pledged on** field, the program defaults the date you are adding the matching the gift. You can change this date by entering a new date in the field or clicking the calendar to select a date. Because Timothy called on 09/12/2006 to make his pledge, enter this date in the **Pledged on** field.
8. In the **Pledge amt** field, the program defaults a pledge amount calculated by multiplying the amount of the matched gift by the multiplication factor. Because Timothy Billings's gift of $1,000 is being matched by a factor of one, the program enters a default pledge amount of $1,000. Because this is the amount of Toy World's check, you do not need to change the default. If the amount the program defaults differs from the actual amount of the matching gift pledge, change the pledge amount by typing over the default pledge amount.

   When the program calculates the default pledge amount, it does not take into account any information entered in the **Notes** box. For example, the program does not adjust the default pledge amount for the note "The company only matches gifts for employees with three or more years of service." To adjust the pledge amount to comply with a note, type over the default pledge amount.

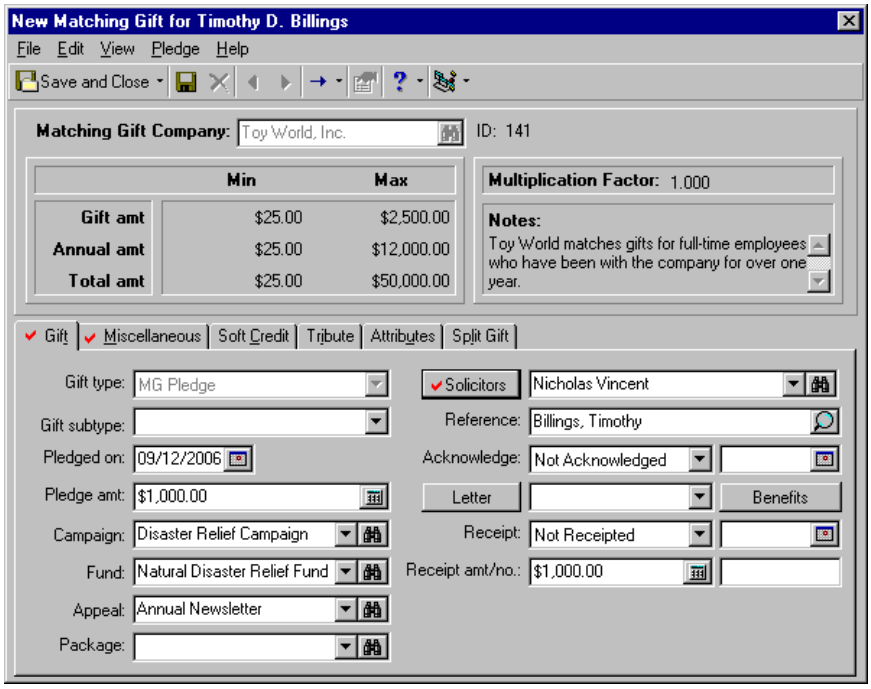
Note: If you split the matched gift among multiple campaigns, funds, appeals, or packages, the program defaults your selections in the corresponding fields on the matching gift record and disables the **Campaign**, **Fund**, **Appeal** and **Package** fields on the matching gift record. You can edit this information on the Soft Credit tab of the matching gift pledge record. For more information, see "Split Gift Tab" on page 265.

9. In the **Campaign**, **Fund**, **Appeal**, and **Package** fields, the program defaults the entries selected in the corresponding fields on the Gift tab of Timothy's gift record. You want to designate the matching gift toward the same campaign, fund, and appeal as Timothy's gift, so you do not need to change the defaults. A package was not designated on the appeal record, so one does not default in this example.

10. In the **Solicitors** field, the program defaults “Allison Andrews” and calculates the amount of credit she should receive based on the percentage of credit she received for Timothy Billing’s gift. Remove the defaults and credit Nicholas Vincent for the full amount of the matching gift because he is the person in your organization responsible for locating organizations that match gifts. For more information about crediting solicitors, see “Crediting Solicitors for a Gift” on page 32.



11. Click **OK**. You return to the New Matching Gift screen.

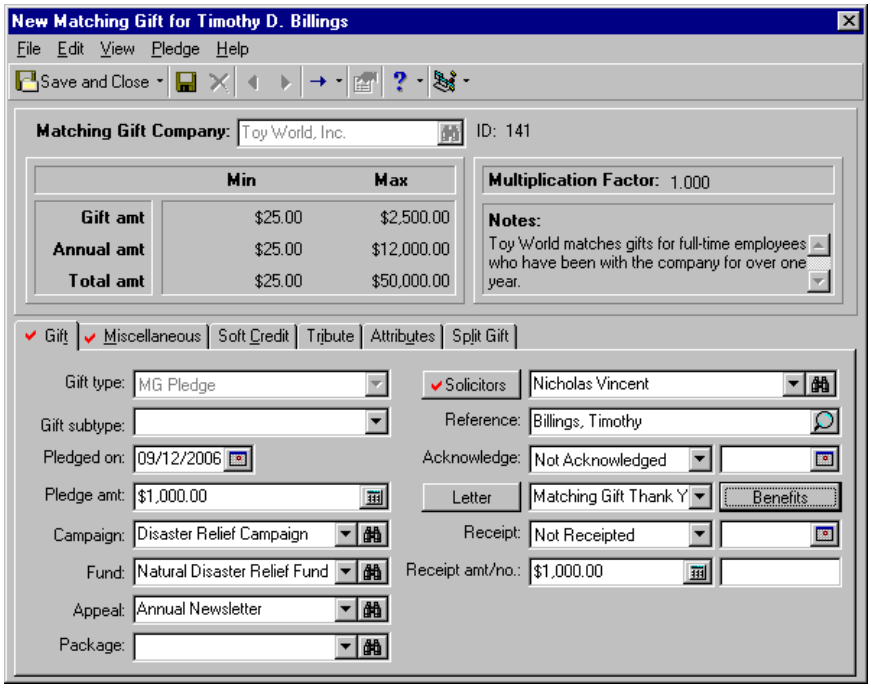


Note: You can delete or change the message that appears in the **Reference** field as necessary to conform to any procedures your organization may follow.

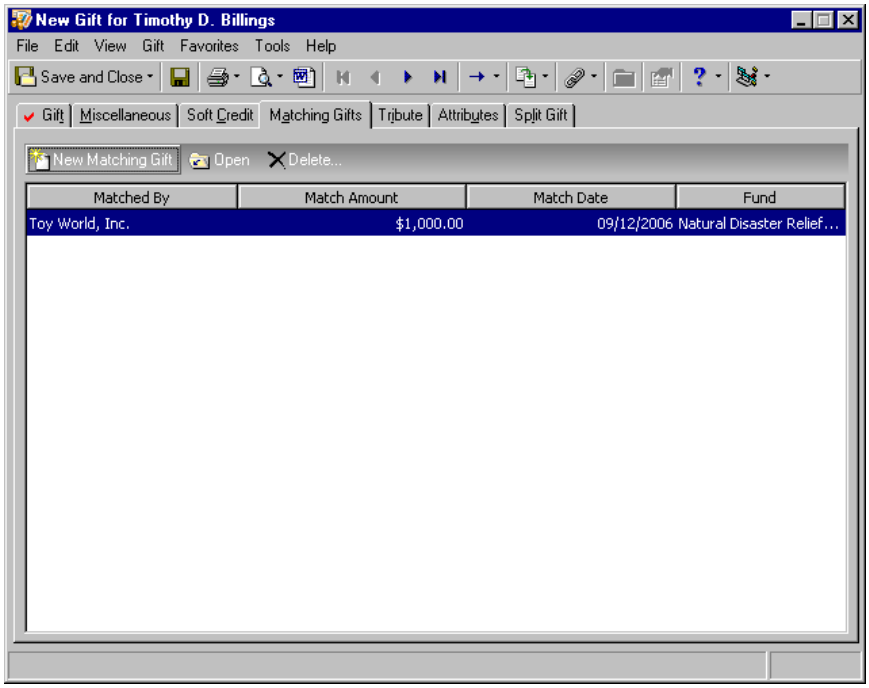
12. In the **Reference** field, the program adds a message to track the constituent who donated the matched gift. In this case, the program adds the message “Billings, Timothy”.
13. In the **Acknowledge** field, select “Not Acknowledged”. You plan to generate a thank you letter through *Mail*, so you do not need to enter a reference date. *Mail* can automatically update the **Acknowledge** field to Acknowledged and enter the date you print the letter. For more information about generating letters through *Mail*, see the *Mail Guide*.

Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see “Creating an Acknowledgement Letter from a Gift Record” on page 101.

14. In the **Letter** field, select “Matching Gift Thank You” because you plan to send this mail merge letter to Toy World. In the **Letters** option of *Configuration*, you define the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
15. In the **Receipt** field, select “Not Receipted”. You plan to print receipts through *Mail*, so you do not need to enter a reference date. When you print a receipt for this gift in *Mail*, the program can update the **Receipt** field to Receipted and enter the date you print the receipts. For more information about printing receipts through *Mail*, see the *Mail Guide*.
16. In the **Receipt amt** field, enter the amount $1,000. You do not need to enter a receipt number in the **Receipt no.** field because the program can automatically add the receipt number when you print a receipt for this gift using the Receipts mail task in *Mail*.



17. On the toolbar, click **Save and Close**. You return to the Matching Gifts tab of Timothy Billings's gift record.



18. To add Timothy's gift and Toy World's matching gift pledge to the database, click **Save and Close** on the toolbar.

Paying a Matching Gift Pledge

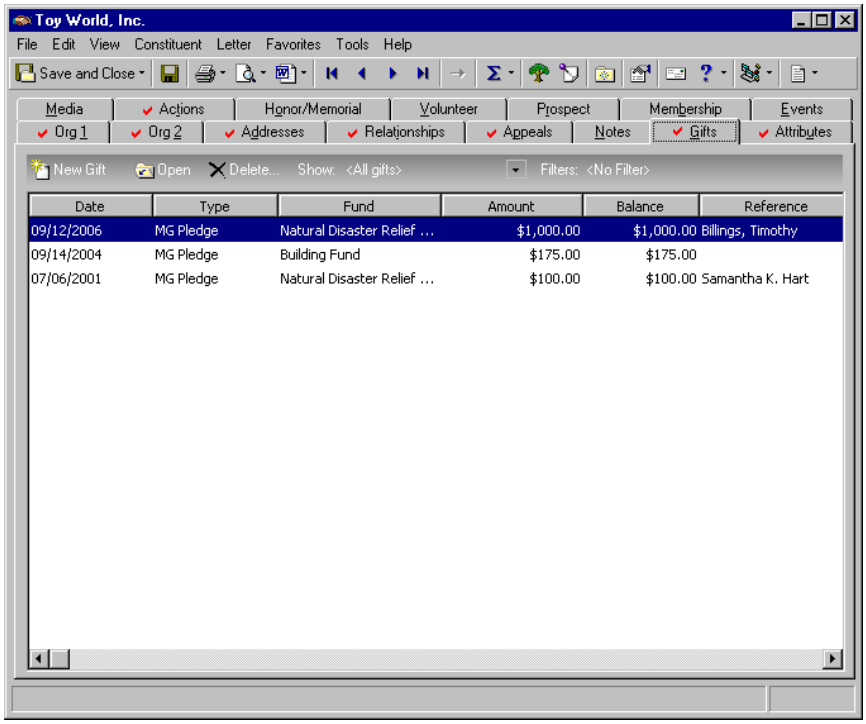
When a matching gift company sends the payment for a matching gift pledge, you need to apply the payment toward the matching gift pledge to reduce the balance. When you apply a payment toward a matching gift pledge, the same fields and options are available as when you apply a gift to a pledge. For information about applying a payment to a pledge, see "Applying a Payment Toward a Pledge" on page 164.

- **Paying a single matching gift pledge**

Scenario: You received a check for $1,000 from Toy World to pay their matching gift pledge for Timothy Billings's gift of $1,000. The check is dated 09/28/2006 and has the number 1560. To pay a matching gift pledge, you must first create the matching gift pledge from the gift record of the matched gift. This scenario uses the matching gift pledge created in "Adding a matching gift" on page 268.

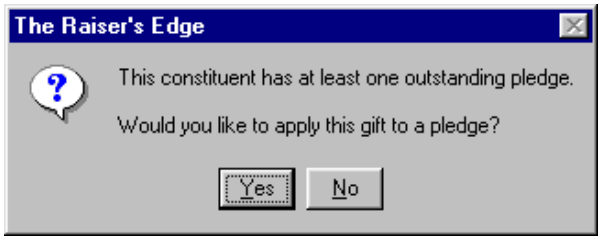
Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information on this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

1. From Toy World's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*. The program displays the matching gift pledge in the Gifts grid.



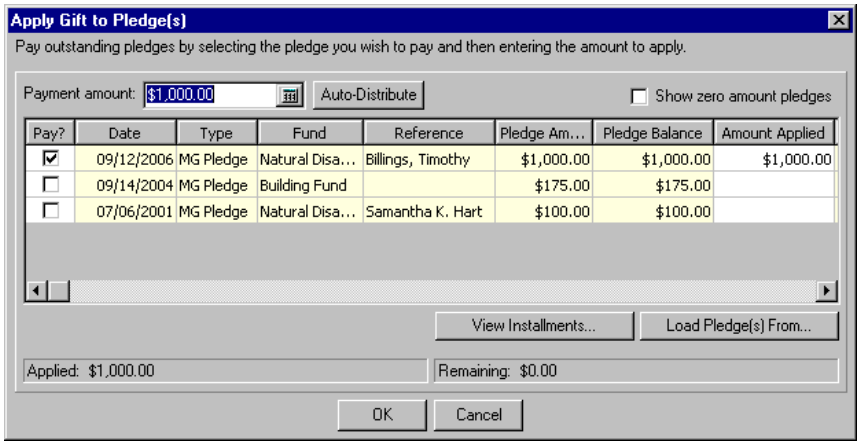
Note: This message appears when you mark the **When adding a gift warn if constituent has outstanding pledge balances** checkbox in *Configuration*. If you do not receive this message, select **Gift**, **Apply to** from the menu bar. When the sub menu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

2. On the action bar, click **New Gift**. The program displays a message.



Note: If you enter the gift amount in the **Amount** field on the Gift tab before you open the Apply Gift to Pledge(s) screen, the program automatically defaults the gift amount into the **Payment amount** field.

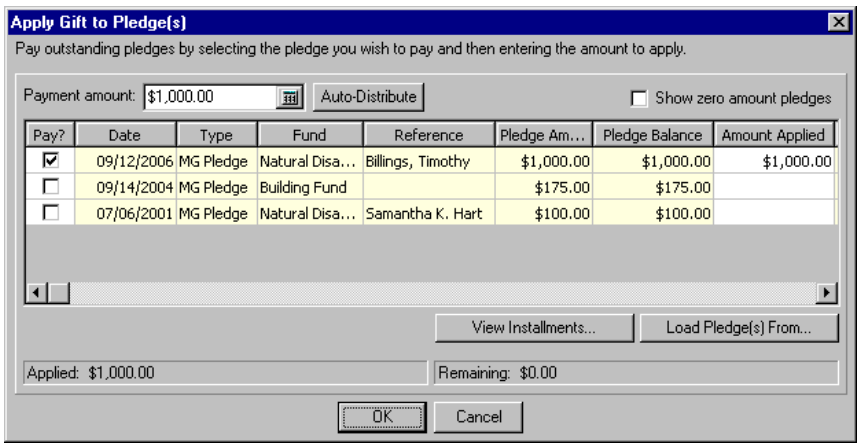
3. Click **Yes** to apply Toy World's payment toward the existing matching gift pledge. The Apply Gift to Pledge(s) screen appears.



4. In the **Payment amount** field, enter the amount $1,000, which is the amount of the check from Toy World.

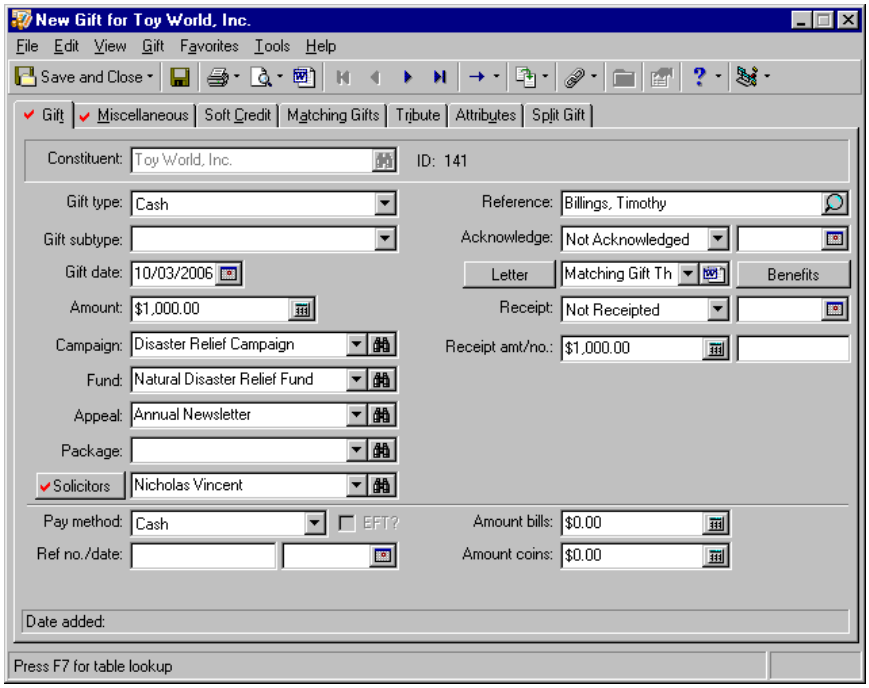
Note: If you click **Auto-Distribute** without marking the checkbox in the **Pay?** column for any pledge, the program distributes the amount entered in the **Payment amount** field evenly among all pledges. If you mark multiple checkboxes in the **Pay?** column, the program distributes the **Payment amount** evenly among the selected pledges.

5. In the **Pay?** column, mark the checkbox in the row containing Toy World's $1,000 matching gift pledge.
6. Click **Auto-Distribute**. The program adds the **Payment amount** to the **Amount Applied** column for Toy World's $1,000 matching gift pledge. You can resize the columns in the grid by clicking the edge of a column and dragging the column to the width you need. It may be necessary to use the horizontal scroll bar to view the **Amount Applied** column.



Note: To edit information entered on the Apply Gift to Pledge(s) screen after you click **OK**, select **Gift**, **Apply to** from the menu bar. When the sub menu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears so you can make any necessary changes.

7. Click **OK**. You return to the Gift tab of Toy World's gift record. The program defaults the entries selected in the **Campaign**, **Fund**, **Appeal**, **Package**, **Solicitors**, **Reference**, and **Letter** fields on the matching gift pledge record to the gift record for the pledge payment. You can change these defaults as necessary.

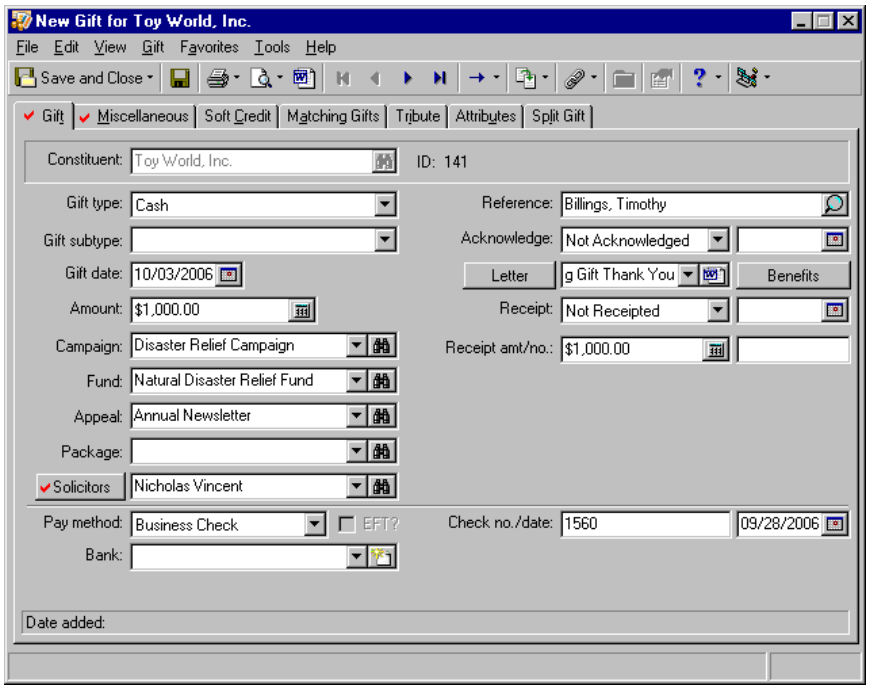


8. In the **Gift type** field, select "Cash" because Toy World paid the pledge with a cash gift.
9. In the **Gift date** field, the program defaults today's date. In this case, it is not necessary to change this date.
10. In the **Amount** field, the program enters the amount you entered in the **Payment amount** field on the Apply Gift to Pledge(s) screen. If you change this amount, you need to access the Apply Gift to Pledge(s) screen to change the amount applied to the matching gift pledge.

Note: You can generate a single acknowledgement letter from a gift record using the Microsoft *Word* icon in the **Letter** field. For more information, see "Creating an Acknowledgement Letter from a Gift Record" on page 101.

11. In the **Acknowledge** field, select "Not Acknowledged". You plan to generate a thank-you letter through *Mail*, so you do not need to enter a reference date. *Mail* can automatically update the **Acknowledge** field to Acknowledged and enter the date you print the letter. For more information about generating thank-you letters in *Mail*, see the *Mail Guide*.
12. In the **Letter** field, the program defaults "Matching Gift Thank You" from the matching gift pledge record. Instead, select "General Thank You" because you want to send this mail merge letter to thank Toy World in response to their pledge payment. In the **Letters** option of *Configuration*, you define the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
13. In the **Receipt** field, select "Not Receipted". You plan to print your receipts through *Mail*, so you do not need to enter a reference date. When you print a receipt for this gift in *Mail*, the program can update the **Receipt** field to Receipted and enter the date you print the receipts. For more information about printing receipts in *Mail*, see the *Mail Guide*.
14. In the **Receipt amt** field, the amount $1,000 appears automatically. You do not need to enter a receipt number in the **Receipt no.** field because the program can automatically add the receipt number when you print a receipt for this gift in *Mail*.
15. In the **Pay method** field, select "Business Check".

16. In the **Check no./date** fields, enter the check number 1560 and check date 09/28/2006.

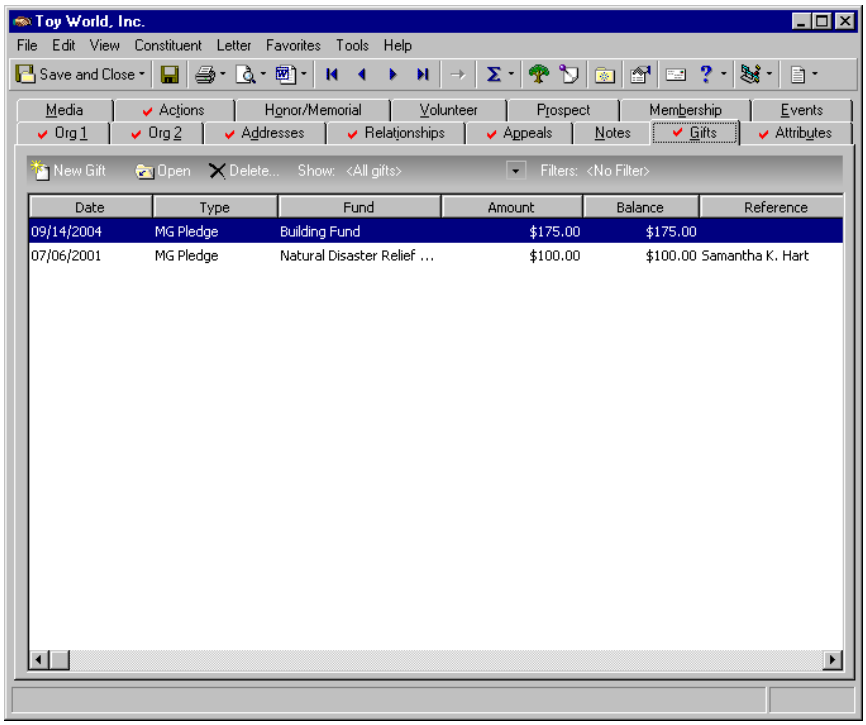


17. Click **Save and Close** on the toolbar. The gift record for Toy World's matching gift pledge payment is added to the database and applied toward Toy World's matching gift pledge.

Paying multiple matching gift pledges at the same time

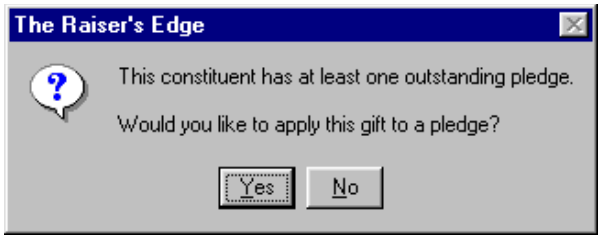
Scenario: Samantha Hart and Nicole Dustin are employees of Toy World. Toy World has a constituent record in your database and matches gifts donated by employees on a one-to-one ratio. Both employees donated gifts to support your Annual Campaign. Samantha gave $150 and Nicole gave $300 for a total of $450. Toy World just sent a single check for $450 to pay both matching gift pledges. Now you need to create a new gift record for Toy World's payment and apply it toward Toy World's matching gift pledges.

1. From Toy World's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



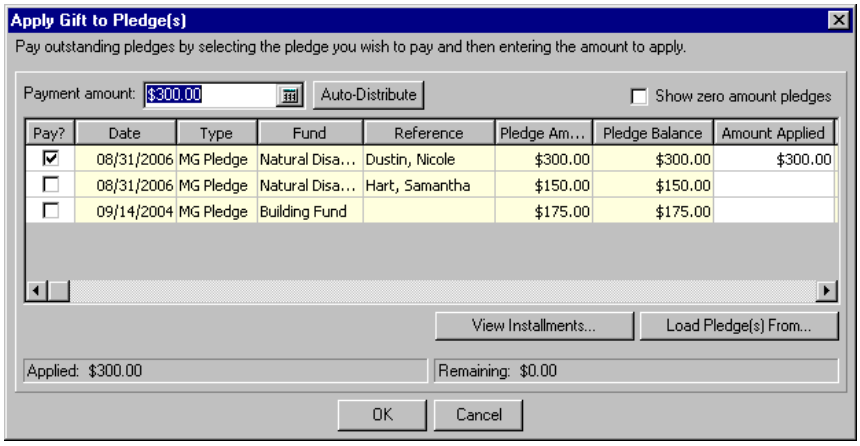
Note: This message appears when you mark the **When adding a gift warn if constituent has outstanding pledge balances** checkbox in *Configuration*. If you do not receive this message, select **Gift**, **Apply to** from the menu bar. When the sub menu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

2. On the action bar, click **New Gift**. The program displays a message.



Note: Because the **Show zero amount pledges** checkbox is not marked, Toy World's fulfilled matching gift pledges do not appear in the grid on the Apply Gift to Pledge(s) screen.

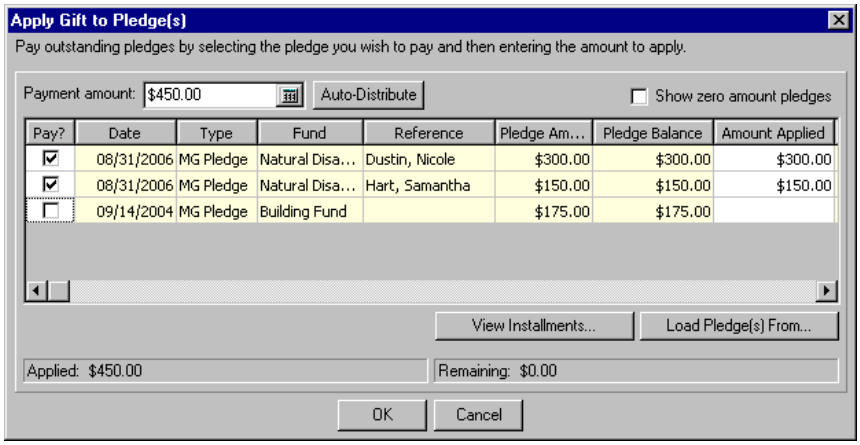
3. Click **Yes** to apply Toy World's payment toward existing matching gift pledges. The Apply Gift to Pledge(s) screen appears.



4. In the **Payment amount** field, enter the amount $450, which is the amount of the check from Toy World.

Note: If you click **Auto-Distribute** without marking the checkbox in the **Pay?** column for any pledge, the program distributes the amount entered in the **Payment amount** field evenly among all pledges. If you mark multiple checkboxes in the **Pay?** column, the program distributes the **Payment amount** evenly among the selected pledges.

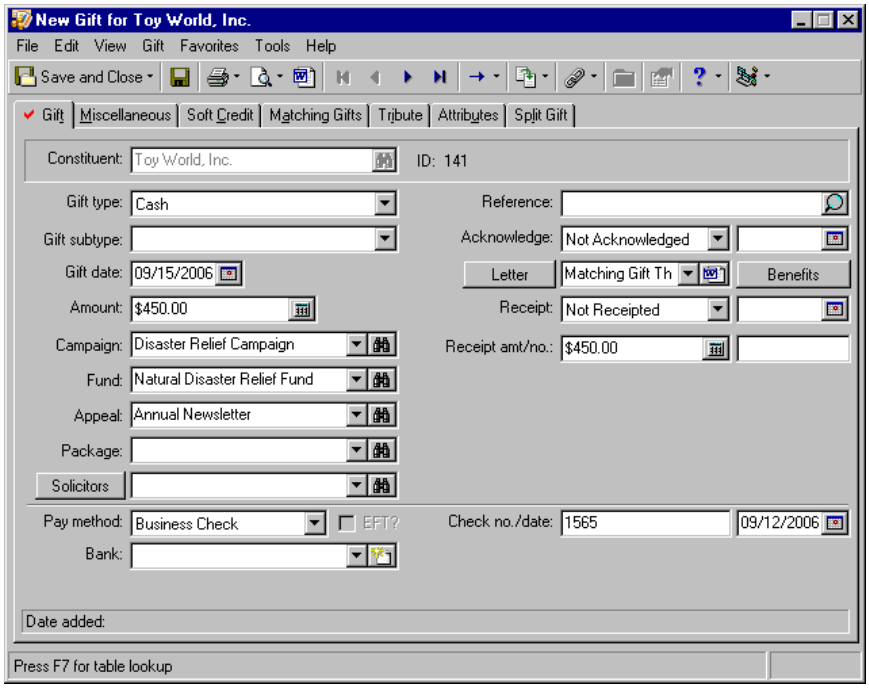
5. In the **Pay?** column, mark the checkboxes next to the matching gift pledges for Samantha and Nicole.
6. Click **Auto-Distribute**. The program adds the **Payment amount** to the **Amount Applied** column for the matching gift pledges you are paying. You can resize the columns in the grid by clicking the edge of a column and dragging the column to the width you need. It may be necessary to use the horizontal scroll bar to view the **Amount Applied** column.



Note: To edit the information on the Apply Gift to Pledge(s) screen after you click **OK**, select **Gift**, **Apply to** from the menu bar. When the sub menu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears so you can make any necessary changes.

7. Click **OK** to apply the gift to the pledges and return to the Gift tab of Toy World's gift record. Because you are paying multiple pledges, the program does not add any defaults to this gift record from the records for the matching gift pledges you are paying.

8. On the Gift tab, enter the following information for Toy World's payment using the same method as any other gift. For more information, see "Adding a Cash gift" on page 68.



9. Click **Save and Close** on the toolbar.

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