

Team Approach 5.0.1
Managing Matching Gifts

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Matching Gifts

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Setting Up a Matching Company

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Overview of Setting up a Matching Company

Team Approach[®] (TA) contains processing that facilitates the entry and tracking of matching gifts. To capitalize on this processing, you need to set up the following information for each matching company.

- Identify the company's account as a matching company.
- Enter the matching gift rules for the matching company.
- Set up matching gift relationships for each donor whose gifts the company will match.

Identifying a Company as a Matching Company

For each matching company, complete the following steps to identify the company in TA as a matching company.

1. Access the Account Overview screen.
2. Find the account for the matching company. If an account does not exist for the company, create one.
3. Enter a unique brief name for the account in the Brief Name field on the Account Overview screen. You should follow your organization's policy for creating the brief name. A brief name can be up to 12 characters long and cannot begin with a number. A brief name cannot contain any special characters, including spaces.
4. Access the Brief Name Functions window by pressing the [F10] key from the Brief Name field.
5. Type "A" for active in the Matching Company? field on the Brief Name Functions window.
6. Exit the Brief Name Functions window by clicking <OK>.
7. On the Account Overview screen, enter the ratio at which the company matches gifts. Press the [F9] key to view the list of ratios. You must enter a match ratio to set up matching gift relationships.

Note: You can add the brief name and the brief name function from the Create New Account window when you create the account.

Entering the Matching Gift Rules for a Company

On the Account Overview screen, you can set up the matching gift rules for a matching company. You can enter the following rules.

- The ratio at which the company matches gifts.

- The minimum and maximum gift amounts matched by the account. When you enter a gift to be matched, TA checks the information in these fields and displays a warning if the amount of the gift is outside this range.
- The maximum contribution the account will make per year. This field is for information only; TA does not use this information anywhere else in the system.
- Whether the company matches installment gifts. When you enter a gift to be matched, TA checks the information in this field and displays a warning if the gift to be matched has a gift kind of "IN" for installment or "SG" for sustaining gift.
- Whether the company matches gifts that are awarded premiums. Although the processing related to this rule is still in development, you should set up this rule appropriately.
- If the company matches gifts that are awarded premiums, whether TA should deduct the value of the premium from the gift to figure out the actual amount to match. Although the processing related to this rule is still in development, you should set up this rule appropriately.

During gift entry, TA does not prevent you from entering a matching gift form for a gift that does not meet the matching company's rules. TA does display the appropriate message in the status bar to indicate which rule the gift does not meet. For example, a company matches gifts equal to or greater than \$50. You indicate that you have a matching gift form for an employee of the company, but the employee's gift is only \$40. TA displays the warning, "Amount is under minimum or over maximum that company will match." See "[Matching Gift Warnings](#)".

See Also:

[Entering Distribution Information](#)

Entering Distribution Information

You can enter information regarding when the company sends to your organization a check to match gifts made by other accounts. You can enter this information in one of three ways.

- You can enter the distribution months.
- You can enter the frequency.
- You can enter both the distribution months and the frequency.

Entering the Distribution Months

If you know the months in which the company sends to your organization a check to match gifts made by other accounts, you can enter the number of those months in the Distribution Date fields. For example, if a matching company sends a check once in March, once in June, once in September, and once in December, you can set the distribution information as follows:

- Date 1 to "03"
- Date 2 to "06"
- Date 3 to "09"
- Date 4 to "12"

Entering the Distribution Frequency

If you know how often the company sends your organization a check to match gifts made by other accounts, you can enter that information in the Frequency field. Press the [F9] key to view the list of frequencies. For example, if a matching company sends a check four times per year, set the Frequency field to "Q" for quarterly.

Entering the Distribution Months and the Distribution Frequency

If you know both how often the company sends your organization a check to match gifts made by other accounts and the months in which the company sends the check, you can enter that information in both the Frequency field and the

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Distribution Date fields. For example, if a matching company sends a check four times a year, once in March, once in June, once in September, and once in December, you can set the distribution information as follows:

- Date 1 to "03"
- Date 2 to "06"
- Date 3 to "09"
- Date 4 to "12"
- Frequency to "Q"

Setting Up a Matching Gift Relationship

[Setting Up a Matching Gift Relationship for a Matching Company](#)
[Soft Credits Awarded to Employees Whose Gifts are Matched](#)

Setting Up a Matching Gift Relationship for a Matching Company

You can set up a matching gift relationship for each account whose gifts are matched by a company that you have set up as a matching gift company in TA. You can set up a matching gift relationship for a new company or for a company that didn't previously match gifts but does now.

You can set up the matching gift relationship in one of two ways.

- You can set up the relationship from the company's account.
- You can set up the relationship from the account whose gifts can be matched.

See Also:

[Setting Up a Matching Gift Relationship from the Matching Company's Account](#)
[Setting Up a Matching Gift Relationship from the Employee's Account](#)
[Setting Up a Matching Gift Relationship for an Existing Company](#)
[When TA Automatically Marks the Company Match? Checkbox](#)

Setting Up a Matching Gift Relationship from the Matching Company's Account

To set up the matching gift relationship from the company's account, complete the following steps.

1. Access the Relationship Entry screen.
2. Click the <New> button on the toolbar to access the Create New Relationship window.
3. TA defaults the Account ID of the company's account and the company's name. Do not change the name.
4. In the first Related To field, enter the Account ID of the account whose gifts can be matched. If you don't know the Account ID, press the [F9] key to access the Find an Account window to find the account.

5. In the second Related To field, enter the related person's name. Press the [F9] key to see the list of names within the account.
6. Enter the appropriate relationship into the Relationship Type field (for example, "ORG/EMP" for the Organization to Employee relationship). Press the [F9] key to view the list of relationship types.
7. Click <Create> to create the relationship.
8. Repeat steps 1 through 7 for each account whose gifts can be matched by the company.

When you create a relationship, TA automatically creates the reverse relationship. For example, for a matching gift relationship between a company and an employee, when you create the relationship from the organization to the employee, TA does the following:

- Creates the relationship from the employee to the organization, and
- Marks the Company Match? checkbox for the reverse relationship.

Because TA automatically creates the reverse relationship and marks the Company Match? checkbox for the reverse relationship, each matching gift relationship is set up, enabling you to take advantage of TA's matching gift processing during gift and pledge entry.

Setting Up a Matching Gift Relationship from the Employee's Account

To set up the relationship from the account whose gifts can be matched, complete the following steps.

1. Access the Relationship Entry screen.
2. Click <New> on the toolbar to access the Create New Relationship window appears.
3. TA defaults the Account ID of the account whose gifts can be matched and the account's name. In the Name field, enter the name of the person within the account who is related to the company. Press the [F9] key to see the list of names within the account.
4. In the first Related To field, enter the Account ID of the matching company's account. If you don't know the Account ID, press the [F9] key to access the Find an Account window to find the matching company's account.
5. In the second Related To field, enter the name of the account as a whole and not that of a contact at the company.
6. Enter the appropriate relationship into the Relationship Type field (for example, "EMP/ORG" for the Employee to Organization relationship). Press the [F9] key to view the list of relationship types.
7. Click <Create> or press the [Enter] key to create the relationship.
8. Repeat steps 1 through 7 for each company that matches gifts made by this account.

Because the related account is set up as a matching company, the Company Match? checkbox on the Relationship Entry screen is automatically marked for each account whose gifts can be matched.

When you create a relationship, TA automatically creates the reverse relationship. For matching gift relationships, when you create the relationship from the account whose gifts can be matched to the matching company, TA creates the relationship from the matching company to the account whose gifts can be matched.

Setting Up a Matching Gift Relationship for an Existing Company

If an existing company that is not set up as a matching company begins matching gifts and relationships already exist for the company, complete the following steps.

1. Set up the company as a matching company (see "[Identifying a Company as a Matching Company](#)").

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2. For each relationship that should be a matching gift relationship, mark the Company Match? checkbox for the account whose gift can be matched. When you set up an existing company as a matching company, TA does not automatically mark the Company Match? checkbox for relationships that already exist.

Note: For any new matching gift relationships you create after setting up an existing company as a matching company, TA automatically marks the Company Match? checkbox on the Relationship Entry screen for the account whose gifts can be matched.

When TA Automatically Marks the Company Match? Checkbox

TA automatically marks the Company Match? checkbox for a relationship when the current account maps to the Individual/Family account category and the related account is set up as a matching company (that is, the company has a brief name with the Matching Company? brief name function set to "A" for active and a matching ratio set on the Account Overview screen).

For example, if you set up an employee to organization relationship from an employee's account, TA automatically marks the Company Match? checkbox on the Relationship Entry screen for the employee's account if the company is set up as a matching company. If you set up a franchise to franchiser relationship from the franchise's account, TA does not automatically mark the Company Match? checkbox on the Relationship Entry screen for the franchise's account (assuming the franchise's account does not map to the Individual/Family account category).

Note: If you mark the Company Match? checkbox and the related account is not set up as a matching company with a match ratio, TA clears the checkbox. Ensure that the company's account is set up as a matching company. See "[Setting Up a Matching Company](#)".

Soft Credits Awarded to Employees Whose Gifts are Matched

The phrase "soft credit" refers to a financial credit posted to an account based on a gift given by a different account. When you indicate that an employee's gift, pledge, or pledge payment is to be matched by setting the matching gift status to "Unfulfilled-Form Received," TA automatically creates a soft credit for the employee when the employee's gift is processed (*before the company actually fulfills the match*). The amount of the credit equals the amount of the pledge or gift.

Note: If the soft credit is created when you process an installment pledge for the employee, TA increments the payment amount on the soft credit for each installment payment made for the pledge.

Adjusting a Matching Gift Soft Credit

If the matching company does not fulfill the match, and your organization does not want the employee to retain the soft credit awarded when the employee's gift or pledge was processed, you must manually adjust the soft credit.

Complete the following steps to adjust the soft credit.

1. On the Batch Detail Entry screen, enter "AD" for adjustment in the Transaction Type field.
2. Enter the Account ID for the employee's account.
3. TA displays the Transactions window with each transaction the account has made. Click the <Zoom> button to the left of the gift, pledge, or pledge payment for which the soft credit was awarded (i.e., the transaction for which you entered the matching gift information).
4. Zoom on the MG? field and set the Status field to "Ineligible" for the company that did not fulfill the match.

When the batch is released and processed, TA adjusts the soft credit from the employee's account.

Note: You can also use this process to change the amount of the donor's soft credit if, for example, the company fulfills the match but matches less than the expected amount. In this scenario, follow steps 1-3 above. In step 4, set the Match Amount field to the amount the company actually matched.

Entering an Employee's Matching Gift Form

[Overview of Processing a Matching Gift Form](#)

Overview of Processing a Matching Gift Form

When a donor makes a gift that can be matched by his or her employer, you enter the matching gift form information on the Batch Detail Entry screen when you enter the donor's gift.

You can enter the matching gift information when

- An account exists for the matching company,
- A brief name is assigned to the matching company's account,
- The Matching Company brief name function is set to "A" for active for the matching company's account, and
- The matching gifts rules have been entered for the matching company's account.

This section explains the specifics of entering the matching gift form for a donor. See the [Entering an Account's Transactions and Benefits](#) chapter for information on entering a basic gift or pledge.

See Also:

[Entering a Gift with a Matching Gift Form](#)

[Entering a Gift That Can Be Matched Without a Matching Gift Form](#)

[Matching Gift Warnings](#)

Entering a Gift with a Matching Gift Form

Complete the following steps to enter a gift that can be matched for a donor whose gift is accompanied by a matching gift form.

1. Press the [F10] key from the Matching Gift Form? field or set the Matching Gift Form? field to "Y" for yes and press the [Tab] key. TA displays the Matching Gift Forms window.
2. TA does one of the following:
 - *If the donor has only one active matching gift relationship*, TA sets the Company field to the brief name of the company that matches the donor's pledge or gift.
 - *If the donor has multiple matching gift relationships*, TA displays the Matching Gift Companies window. Mark the checkbox to the left of each company for which you have a matching gift form. Click <OK> or press the [Enter] key. TA displays the Matching Gift Forms window.
 - *If the donor has no matching gift relationship*, enter the brief name of the account that will match the donor's pledge or gift. If you don't know the company's brief name, press the [F9] key to see the list of matching company brief names. TA displays a message asking if you want to create a matching gift relationship between the donor and the company. Click <Yes> to create the relationship. Click <No> to enter the matching company without creating a matching gift relationship.
3. TA calculates the matching gift amount by multiplying the amount of the pledge or gift by the ratio at which the company matches. TA sets the Match Amount field to the calculated amount. You can change this amount.

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4. Press the [F9] key from the Status field and select "Unfulfilled, Form Received."
5. TA defaults the Match Transaction Type based on the transaction type of the gift to be matched. You can enter a different type by pressing the [F9] key and selecting from the list of valid types.
6. Enter any comments associated with the matching gift in the Comments field.
7. Press the [Enter] key or click <OK> to close the Matching Gift Forms window and return to the Batch Detail Entry screen.

Note: You can enter more than one matching gift form for a gift or pledge, e.g., if a gift is from a family and more than one person in the family is an employee of a company that matches gifts.

See Also:

[Match Type](#)

Match Type

When you enter matching gift information on the Matching Gift Forms window, you can enter a match type that indicates if the company is matching a gift, a pledge, or a pledge payment. TA defaults the match type based on the transaction type as follows:

- If the transaction is a gift, TA defaults the match type to "GF."
- If the transaction is a pledge, TA defaults the match type to "PL."
- If the transaction is a *first* pledge payment, TA defaults the match type to "PL." If the match applies to the pledge payment and not the pledge, you can change the type to "PP."

If the transaction is a pledge payment other than the first one, TA defaults the type to "PP."

Entering a Gift That Can Be Matched Without a Matching Gift Form

If you know that the donor works for a matching gift company but you don't have a matching gift form from the donor, you can set up a matching gift relationship through the Matching Gift Forms window if this relationship doesn't exist. Press the [F10] key from the Matching Gift Form? field to access the Matching Gift Forms window. Enter the matching company's brief name in the Company field (you can press the [F9] key to view the list of matching company brief names). TA displays a message stating that no matching gift relationship exists between the donor's account and the company. Click <Yes> on the message to create the relationship. You should not change the status because you don't yet have a form.

If your organization sends letters to those accounts who are employees of matching gift companies and who have never sent your organization a matching gift form, the account is included in the selection. When you receive the matching gift form from the account, you can adjust the account's gift or pledge to enter the matching gift form information.

Matching Gift Warnings

Based on the rules set up for the matching company, TA may display one of the following warnings when you enter for processing a gift that can be matched.

Amount is under minimum or over maximum that the company will match.

This message appears in the status bar when the amount of the gift or pledge to be matched is

- Less than the minimum amount matched by the company set on the Account Overview screen, or
- Greater than the maximum amount matched by the company set on the Account Overview screen.

You can still enter the matching gift form information; TA does not prevent you from entering the matching gift form information because the gift or pledge to be matched is either under the minimum or over the maximum that the company will match. Follow your organization's policy for entering such a gift or pledge.

Company does not match installment gifts.

This message appears in the status bar because the pledge entered as one to be matched is an installment pledge but the Installments Allowed? matching gift rule on the Account Overview screen for the matching company is set to "N" for no.

You can still enter the matching gift form information; TA does not prevent you from entering the matching gift form information because the matching company doesn't match installment pledges. Follow your organization's policy in this situation.

Note: TA does not set the match amount if the company does not match installment pledges. You need to manually enter the match amount.

Reconciling a Company's Matching Gift

[Overview of the Matching Gift Reconciliation Process](#)

[Finding a Company's Matching Gift to Reconcile](#)

[Structure of the Matching Gift Reconciliation Screen](#)

[Matching Gift Status](#)

[Reconciling a Gift](#)

[Saving Changes on the Matching Gift Reconciliation Screen](#)

Overview of the Matching Gift Reconciliation Process

In TA, you can reconcile the gifts that are eligible to be matched with the appropriate company's matching gift. To reconcile these gifts, you use the Matching Gift Reconciliation screen, located in the Gifts and Pledges module. From the Matching Gift Reconciliation screen, you can

- Reconcile the matching company's gift with the appropriate gifts,
- Change the matched amount for a reconciled gift,
- Mark an unreconciled gift as ineligible to be matched, and
- View the matching gift rules for the matching company.

Finding a Company's Matching Gift to Reconcile

To find a company's matching gift that you want to reconcile with the appropriate gifts, complete the following steps.

1. Access the Matching Gift Reconciliation screen in the Gifts and Pledges module. TA displays the Find Gifts window.
2. Enter the company whose matching gift you want to reconcile. You can enter the company in one of two ways.
 - Enter the brief name of the matching company in the Brief Name field. You can press the [F9] key to view the list of matching companies' brief names. When you enter the brief name, TA automatically enters the matching company's Account ID and name in the Account ID and Name fields.
 - Enter the Account ID in the Account ID field. TA sets the Brief Name field to the brief name of the matching company you entered in the Account ID field. If you don't know the Account ID, you can press the [F9] key to access the Find an Account window to search for the account.

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3. In the Gift Date field, enter the date of the matching gift you want to reconcile. You can press the [F9] key to see the list of all gifts that you are permitted to reconcile (the list is controlled by your organization's setting of this system preference: [Matching Company Transaction Gift Types](#)). This list includes the amount that has been reconciled to date. TA sets the Gift Sequence Number field based on the gift you select.
4. Click <Find> to find the gift to be reconciled. TA displays the information for the selected gift on the Matching Gift Reconciliation screen.

Structure of the Matching Gift Reconciliation Screen

For the company's matching gift you selected using the Find Gifts window, TA displays the following information at the top of the Matching Gifts Reconciliation screen.

- The name of the matching company
- The date of the matching gift
- The amount of the matching gift
- The match amount received (that is, the sum of the gifts that have been reconciled to this matching gift to date)

Below this information TA displays two blocks: the Reconciled Gifts block and the Unreconciled Gifts block.

See Also:

[Reconciled Gifts Block](#)

[Unreconciled Gifts Block](#)

Reconciled Gifts Block

The Reconciled Gifts block contains the following information for each gift that has been matched by the company's matching gift you selected.

- The Account ID of the donor who gave the gift
- The account's name line
- The gift date and the gift's sequence number
- The payment amount
- The amount of the gift that was matched by the company

When you reconcile a gift, TA sets the Matched Amount field to the expected amount from the Unreconciled Gifts block. You can change the matched amount if the matched amount is different from the expected amount.

Unreconciled Gifts Block

The Unreconciled Gifts block contains the following information for each gift that can be matched by a matching gift from the company.

- The Account ID of the donor who gave the gift
- The account's name line

- The gift date and the gift's sequence number
- The payment amount
- The expected amount of the match from the company
- The matching gift status

TA calculates the expected match amount based on the match ratio for the company. For example, if the company matches gifts .5 to 1 and the account whose gift can be matched gives \$100, TA sets this field to \$50. See "[Identifying a Company as a Matching Company](#)".

Note: TA lists all gifts with the matching gift status "U" for unfulfilled first in the Unreconciled Gifts block. TA lists any gifts with the matching gift status "I" for ineligible last in the Unreconciled Gifts block. See the next section, "[Matching Gift Status](#)," for an explanation of these statuses.

Matching Gift Status

A gift that can be matched is assigned one of three matching gift statuses.

- Unfulfilled, Form Received
- Fulfilled
- Ineligible

The Unfulfilled, Form Received Status

When you enter a gift accompanied by a matching gift form, you assign the status "Unfulfilled, Form Received" to indicate that you have received the matching gift form but you have not yet received the matching gift. The Unreconciled Gifts block includes those gifts for which the matching gift status is set to Unfulfilled, Form Received.

The Fulfilled Status

When you reconcile a gift with a company's matching gift (that is, you move a gift to the Reconciled Gifts block on the Matching Gift Reconciliation screen), TA sets the matching gift status to "Fulfilled." You cannot manually set the matching gift status to Fulfilled; TA automatically sets the matching gift status to Fulfilled when you reconcile the gift. See "[Reconciling a Gift](#)," below, to learn how to reconcile gifts.

The Ineligible Status

If you determine that a gift is ineligible to be matched, you can set the matching gift status to "Ineligible" in the Unreconciled Gifts block. See "[Marking a Gift as Ineligible to be Matched](#)".

Note: On the Matching Gift Reconciliation screen, you can only set the matching gift status to Unfilled, Form Received or Ineligible.

Reconciling a Gift

To reconcile a gift with the company's matching gift, click the <Zoom> button to the left of the gift in the Unreconciled Gifts block. TA moves the gift from the Unreconciled Gifts block to the Reconciled Gifts block. If you move the wrong gift, click the <Zoom> button to the left of the gift in the Reconciled Gifts block to move it back to the Unreconciled Gifts block.

When you reconcile a gift, TA

- Sets the Matched Amount field in the Reconciled Gifts block to the amount from the Expected Amount field in the Unreconciled Gifts block,
- Adds the matched amount to the Match Amount Received field, and
- Sets the matching gift status to "F" for fulfilled for the gift.

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See Also:

[Changing the Amount of the Gift Matched by the Company](#)

[Marking a Gift as Ineligible to be Matched](#)

[Viewing the Matching Gift Rules for the Company](#)

Changing the Amount of the Gift Matched by the Company

The Match Amount Received field on the Matching Gift Reconciliation screen is set to the sum of the Matched Amount fields in the Reconciled Gifts block; that is, TA totals the matched amount for each gift in the Reconciled Gifts block. Sometimes, the match amount received does not equal the amount of the company's matching gift. If your organization's policy is to balance the match amount received with the amount of the company's matching gift, you can adjust the matched amount for one or more reconciled gifts by completing the following steps.

1. Highlight a gift in the Reconciled Gifts block and click in the Matched Amount field.
2. Change the matched amount so that the Match Amount Received field equals the Payment Amount field.

For example, a company that matches gifts 1 to 1 gives a maximum of \$5,000 per year in matching gifts. 10 employees of the company contributed a combined total of \$5,100 to your organization. You entered and processed each employee's gift, including the matching gift information. The company sends a \$5,000 check which you enter and process. On the Matching Gift Reconciliation screen, you reconcile the company's matching gift with the 10 gifts from its employees. TA sets the Matched Amount Received field to \$5,100, the total of the matched amount for each reconciled gift. For one employee gift, you can lower the Matched Amount field in the Reconciled Gifts block by \$100 so the Matched Amount Received field equals the Payment Amount field.

Follow your organization's policy when the matching gift does not equal the amount of the matched gift(s).

Note: The Matched Amount field defaults to the amount from the Expected Amount field in the Unreconciled Gifts block. You cannot change the expected amount.

Marking a Gift as Ineligible to be Matched

On the Matching Gift Reconciliation screen, you can mark a gift as ineligible if the company won't match the gift. For example, a gift came from a person who is retired and the company doesn't match gifts from retirees. With the appropriate gift highlighted in the Unreconciled Gifts block, click in the Status field and enter "I" for ineligible. You can press the [F9] key in the Status field to see the list of statuses.

Viewing the Matching Gift Rules for the Company

You can view the matching gift rules for the company you selected by pressing the [F10] key from the Gift Date field. TA displays the Matching Gift Information window. This window contains the matching gift rules and the comments stored on the Account Overview screen. You cannot update any of the information on the Matching Gift Information window; it is a display-only window. See "[Entering the Matching Gift Rules for a Company](#)".

Saving Changes on the Matching Gift Reconciliation Screen

When you exit the Matching Gift Reconciliation screen, if you changed any of the reconciliation information for a company's matching gift, TA displays the message, "Do you want to save the changes you have made?" Click <Save> to save the changes you have made. Click <Cancel> to exit the Matching Gift Reconciliation screen without saving the changes you have made.

TA displays this message because TA does not save each change you make on this screen as you make the change. TA saves the changes once you exit the screen.

