Create a New Donation Record

Cursor MovementsScript	*Cursor MovementsScript*
There are two common ways to manually create a new donation record.	
The first is from the contacts list.	Show Console. Click Contacts.
Select the donor, then click Add To Contact, then click donation.	Select person. Click Add To Contact. Select Donation. Click Cancel. Close contacts.
The second is in the donations list.	Show console. Expand Fundraising. Click Donations.
Click New. Choose the donor. This is the contact who is making the donation and will receive a receipt for it.	Click New. Choose Donor. Click OK.
Some donors' contact records indicate special recognition requirements, but you can always over-ride this for any particular donation.	Type "Anonymous" into Donor Recognition.
You may wish to indicate other contacts who are involved with this donation.	Point to Other Contacts.
If this donation is in honor or in memory of someone, click the contact icon to choose the In-Honor contact.	Point at icon for In Honor Of.
If another contact is supposed to receive a recognition letter when a donation is made in honor of someone, then click this contact icon to choose the Recognition contacts, and fill in the Send Recognition note. You can configure Sumac to automatically fill in an appropriate Send Recognition contact based on the In Honor contact.	Point at icon for Send Recognition. Point at Notes field.
If another contact should receive a soft credit for this donation, then click the contact icon to choose that contact.	Point at icon for Soft Credit.
When you choose a soft credit contact, you can also indicate the portion of the donation that should be soft credited, as well as indicate if the soft credit should be applied to a pledge.	Point at Soft Credit Amount. Point at Pledge checkbox.
You can configure Sumac to automatically fill in the Soft Credit contact when the donor is chosen. For example, if a particular board member should get credit for donations from a particular donor, you can set this up in advance.	

If additional contacts had some, perhaps relatively small or indirect, influence that led to this donation, then you can record the influencers.	Point at Donation Influences field.
Record financial information here: the payment type, date received, and the total and receiptable amounts. Often the Total Amount and Receiptable Amount are the same,	Point to Financial Information Point to Payment Type, When Received, Total; and Receiptable Amounts.
so when you enter the Total Amount, Sumac automatically puts the same value in Receiptable Amount. But there are some common exceptions.	Enter “0” in Total Amount. Receiptable Amount becomes to “0”
If you are recording an in-kind donation, set the Total Amount to zero and the Receiptable Amount to the value of the gift for tax receipt or insurance purposes.	Point at total amount “0” Enter “100” in Receiptable Amount.
Also, if you are recording a gift in kind, you should include a note to indicate what exactly was donated. Alternatively, if the donor received some kind of benefit for the donation, then the Receiptable Amount is reduced by the value of the benefit received.	Point to Notes field.
For example a $500 ticket for a gala dinner may have a Receiptable Amount of $300 because the donor received a $200 dinner.	Enter “500” into Total Amount. Enter “300” in Receiptable Amount.
Under classification, choose donation type. Donation Type lets you specify the basic nature of the donation.	Point to Classification. Choose “Individual” from Donation Type drop-down box.
If you want to connect this donation to other information in the database, you can choose an appropriate event, campaign, fund, or account here.	Point to Event, Campaign, Fund, and then Account.
Depending on how your organization has fit Sumac into its accounting systems, the Account field may be mandatory. Sumac can be set up to choose the correct account based on other fields like campaign and donation type.	
If a donation is fulfilling a pledge or fund request, then you can link the donation to the appropriate pledge or fund request.	Point to the Links drop-down menu. Choose “Link to Pledge.”
Note that if you create the donation using the pledge list or fund requests list, the connection to the donation is created automatically, so you won’t have to do this manually.	Show “Choose Pledge” window. Click OK.
Finally, if you assign receipt numbers to donations for government tax reporting, Sumac can automatically assign the receipt numbers for you.	Point to Receipt Numbering.

When you click OK to save the donation, it is automatically linked to the donor contact, and can be accessed in both the donations list and the contacts list.	Click OK. Close Donations Window. Open Contacts window. Search for Ansel Adams. Expand record. Select donation.
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