

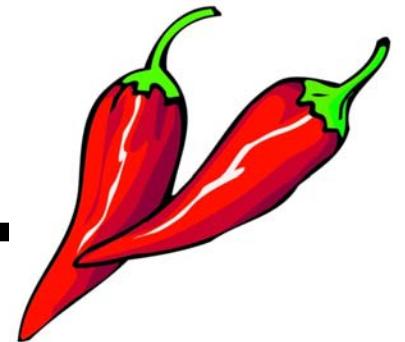
**Tracks – T6**

# **Tracking Donors and Donations**



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**CONNECTIONS 2007**



# Agenda

- Donation Processing
- School Settings for Donations
- Donation Items
- Receipting Donations
- Donation Letters
- Donor Maintenance
- Donation Maintenance
- Reports



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CONNECTIONS 2007



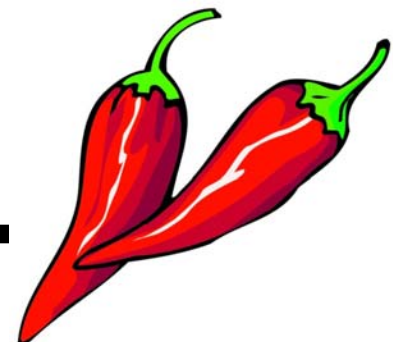
# Why use Donations in Tracks?

- You can track donations by GL Account, Item and Donor.
- Tax credit for school donations (AZ).
- Capture information in organized reports.
- Help plan your budget for the coming year.
- Send thank you letters to benefactors.
- Send letters requesting donations.




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CONNECTIONS 2007



# School Settings

- Assign Next Donation #.
- Assign Next Donor #.
- Specify a Form Letter to print at time of sale.

Next Donation No.	<input type="text" value="1008"/>
Next Donor No.	<input type="text" value="1036"/>
Donation F Letter	<input type="text" value="RECEIPT"/> 
Give Change	<input checked="" type="checkbox"/>
Close Item Screen After Each Line	<input checked="" type="checkbox"/>
Enable Check No./Name field	<input checked="" type="checkbox"/>
Prompt for Reorder Qty exceeded	<input type="checkbox"/>
Use "Other ID" Field	<input type="checkbox"/>
Allow Pre-Payments	<input checked="" type="checkbox"/>



# Donation Items

- Assign Item Number.
- Type = Donation.
- Cust Reqd = NO
- Checks OK w/No Cust.
- Prompt for Price.
- Prompt for GL or provide default.
- Set up as many Items as you need.

Item Maintenance - Play School High School

Item No. DONFA Type Donation

Description Donation - Fine Arts Last Activity 03/14/06

1. Main 2. Levels 3. Additional

Cust Reqd  Cash Only

Sundry

Taxable

Grade Limits

Department

Grouping

Save History

Checks OK with No Cust

Print extra receipt with no price

Include in Physical Count

Prompt Price

Price 0.00

Cost 0.00

Last Cost 0.00

Prompt Qty

Quantity Limit 0

Reorder Level 0

Normal Stock 0

Qty On Hand 0

Category

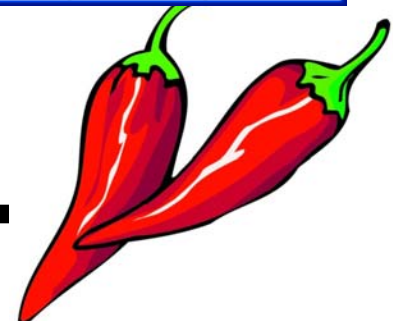
Prompt GL?

GL Account 2245-00-00

Musical Theater

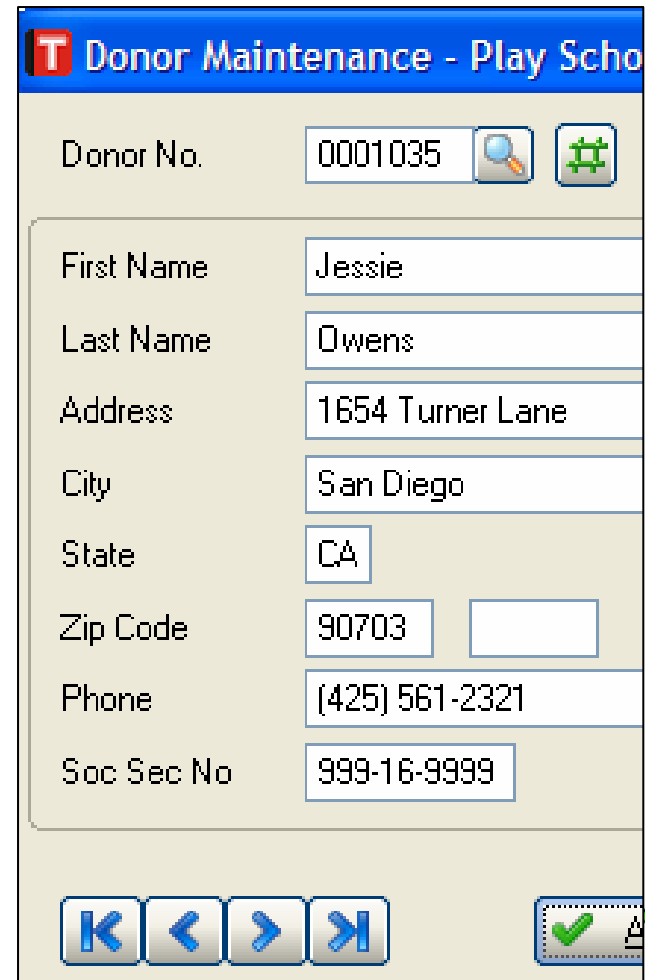
Accept Cancel Delete Print Help

Item Quantity on Hand ZPLAY 06/12/06





# Receipting Donations

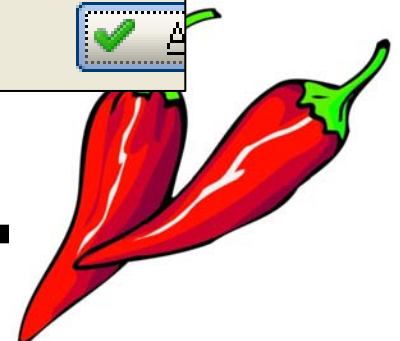
- Sell Item as usual.
- When you click F9, you are prompted to enter Donor.
  - Use lookup for existing Donor.
  - Select # for New Donor.
- Enter How Paid Information.
- Complete as usual.
- In addition to standard receipt, Tracks will print form letter receipt, if selected.



The screenshot shows a software window titled "Donor Maintenance - Play Scho". It contains a form with the following fields and values:

Donor No.	0001035		
First Name	Jessie		
Last Name	Owens		
Address	1654 Turner Lane		
City	San Diego		
State	CA		
Zip Code	90703	<input type="text"/>	
Phone	(425) 561-2321		
Soc Sec No	999-16-9999		

At the bottom of the window, there are four navigation buttons (Home, Previous, Next, End) and a checkbox with a green checkmark.



# Donation Letter – Maintenance

**T Donation Form Letter Maintenance - Play School High School**

Letter Code: RECEIPT

Description: Donation Receipt

Fields:

Choose a field from the drop down, position cursor in the letter, right mouse click and PASTE. Or simply type the field like <BAL>.

<DATE>

<DONOR>

Dear Donor:

Thank you so much for your generous donation to our school. As you know, in these days of budgetary constraints, supplemental financial support for our student programs is becoming increasingly important. With the help and support of concerned citizens like you, we can continue to offer quality programs to our students. This document serves as your receipt for funds received.

<DONATIONS>

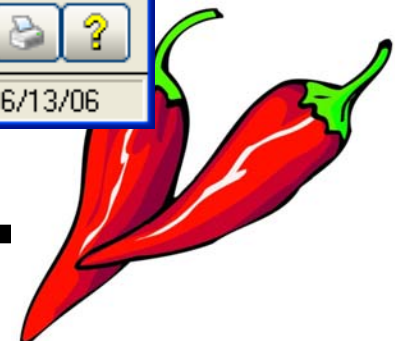
On behalf of the faculty, staff, and students here, thanks again for your donation.

Text to be displayed in the letter: ZPLAY 06/13/06

Donation Form Letters access data in the donation files.



CONNECTIONS 2007



# Donation Letter – Printing

## Printing Options:

- Print letter when donation is receipted.
- Print letters by donor name or a date range.

Form Letter Code: RECEIPT

Selection: All

Donor Name:  [Search]

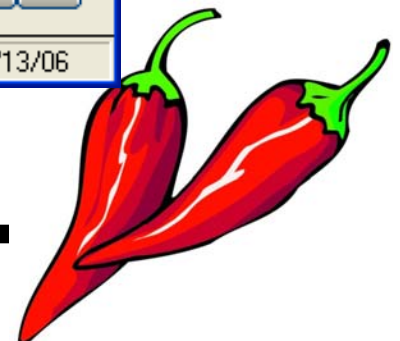
Date Range:  Starting: 07/01/05 Ending: 12/31/00

Remember Settings:

Path: \\PHONESERVER\SAMSUNG on Ne08:

Buttons: Print, Preview, Cancel, Setup, ?

Status: ZPLAY 06/13/06



# Donation Form Letter

Play School High School  
13240 Evening Creek Drive South  
San Diego, CA 92128  
800-954-2583

06/13/06

Anchovy, Carol  
456 Fish Lane  
San Diego, CA 90373

Dear Donor:

Thank you so much for your generous donation to our school. As you know, in these days of budgetary constraints, supplemental financial support for our student programs is becoming increasingly important. With the help and support of concerned citizens like you, we can continue to offer quality programs to our students. This document serves as your receipt for funds received.

Receipt No.	Date	Item No.	Item Description	Amount
0001060	08/23/05	DONSPT	Donation - Sports	100.00
		Athletic Club		
0001060	08/23/05	DONFA	Donation - Fine Arts	100.00
		Musical Theater		
Total Amount of this Receipt				200.00

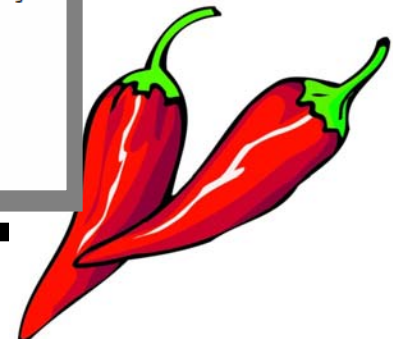
On behalf of the faculty, staff, and students here, thanks again for your donation. You are helping to make our school a better place!

Very truly yours,

PLAY SCHOOL HIGH SCHOOL



CONNECTIONS 2007



# Donor Maintenance

- Add New Donors.
- Correct/Update Existing Donor Information.

Donor No. 0001022

First Name Tom

Last Name Jones

Address 9833 Washington Place

City San Digo

State CA

Zip Code 95412 4577

Phone (858) 486-5421

Soc Sec No 745-78-4544

Accept Cancel Delete ?





ZPLAY 03/06/07

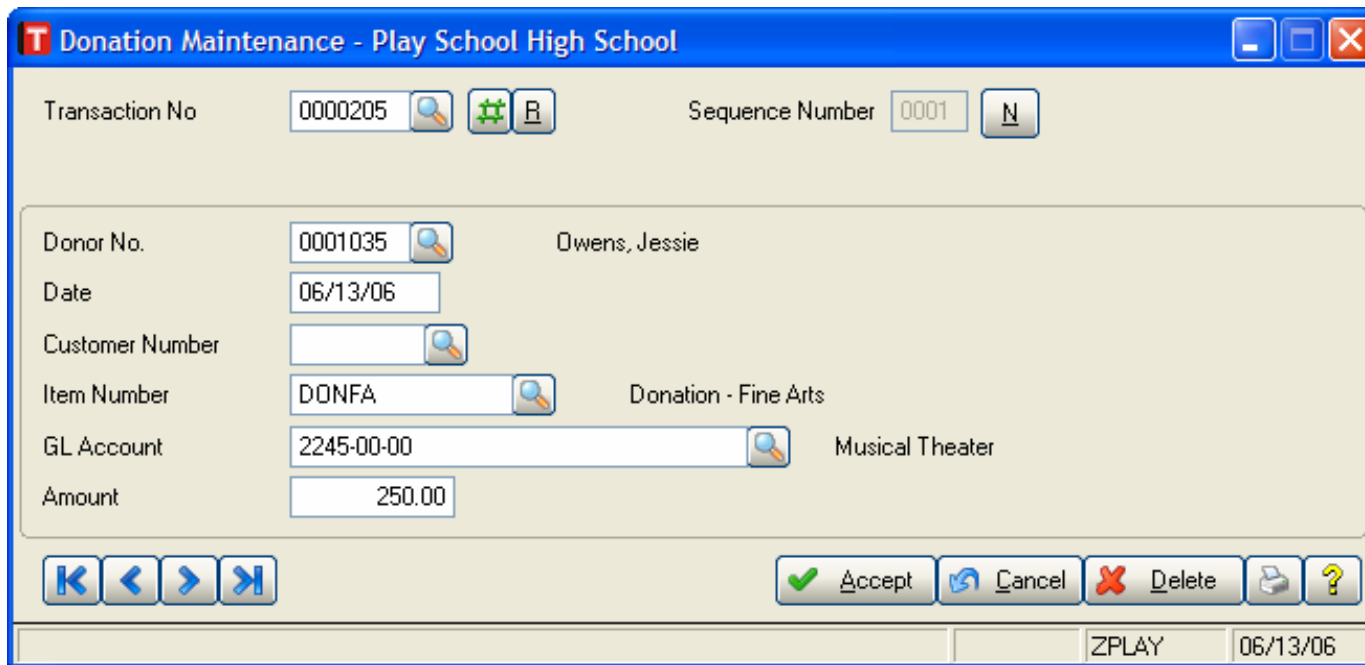


CONNECTIONS 2007



# Donation Maintenance

- Record Donations not originally received in Tracks.
- Select  to start a new record.
- Select  to lookup an existing donation.
- Select  to lookup an old receipt that should have been a donation.
- Select  to add a new line to the receipt.



Transaction No 0000205 Sequence Number 0001

Donor No. 0001035 Owens, Jessie

Date 06/13/06

Customer Number

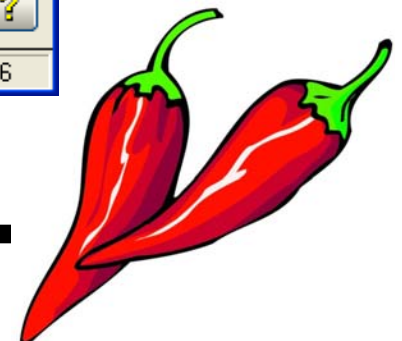
Item Number DONFA Donation - Fine Arts

GL Account 2245-00-00 Musical Theater

Amount 250.00

Accept Cancel Delete ?

ZPLAY 06/13/06



# Donation Reports

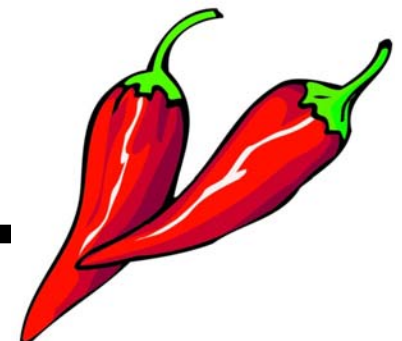
J - Play School High School					
Reports	Tracks Plus	TexTrack	Modules	Management	Help
Sales Reports					
Customer Reports					
Item Reports					
Donation/Tax Credit Reports					
Volunteer Hours Tracking					

- Donations by GL Report
- Donations by Item Report
- Donations by Donor Report
- Donor Listing
- Form Letter Maintenance
- Form Letter Printing

**Reports by GL Account, by Item, by Donor.**



**CONNECTIONS 2007**







# Donor Listing Report

**T Donor Listing - Play School High School**

Selection All Starting Ending

Donor Name:

Remember Settings

\\PHONESEP

Play School High School

**DONOR LISTING**

Donor Number	Last Name	Full Name	Address	Phone Social Sec #
1029	Anchovy	Anchovy, Carol	456 Fish Lane San Diego, CA 90373-	(619) 873-9300 345-98-7855
1034	Grimes	Grimes, Robert	2709 Palm Ave San Diego, CA 91254-	(897) 587-5690 999-23-5487
1030	Johnson	Johnson, Carrie	35843 Renaldo Way San Diego, CA 92323-	--
1022	Jones	Jones, Tom	9833 Washington Place San Digo, CA 95412-4577	(858) 486-5421 745-78-4544
1024	Lautenschlager	Lautenschlager, Bill	3833 Overland Way San Diego, CA 92144-	(619) 457-7777 785-46-4544
1035	Owens	Owens, Jessie	1654 Turner Lane San Diego, CA 90703-	(425) 561-2321 999-16-9999



CONNECTIONS 2007



# Let's Walk Through It! Or Questions & Answers



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CONNECTIONS 2007

