

# Donation System Overview

## A Typical workflow

### Checks / online donations are received

1. Donations as received are entered into donation system.
2. The donation ID generated by the system is written on the back of each check or online receipt.
3. Each check or receipt is scanned into the system and placed in a folder.
4. The donation details that include the scanned check/receipt are printed and optionally emailed to the treasurer as a PDF file.
5. Donation acknowledgment letters are created by the donation system and mailed.

### Periodically (weekly)

1. A year-to-date spreadsheet is generated by the system and transmitted to the treasurer with the checks received.
2. Based on spreadsheet entries, checks are deposited into appropriate bank account.
3. Information from the spreadsheet is imported or entered into accounting system.

### Added Benefits

1. A second set of books for audit and/or reconciliation
2. Summary reporting of donations to the conference
3. Year-end tax letters to donors

# Entering Donations Received

A check is received from Santander Bank in the amount of \$400. The enclosed letter states that it is for the Giving Tree program. The donor is already in the system and a new donation entry is created.

The screenshot shows a software window titled "Sponsors" with a sub-header "Conference Donors" and "3 of 266" items. It includes search filters for "Find by Last Name" and "Find by Organization", and action buttons for "Add", "Update", and "Delete".

The "Name and Address" field contains:  
Santander Bank  
77 Centre Street  
Middleboro, MA 02346

The "Phone / Email" field is empty.

The "Campaign Appeals" section has three checkboxes:  
 Golf Tournament  
 Annual Appeal  
 Giving Tree

The "Donations" section shows a total of \$400.00 and a past 12 months total of \$400.00. An "Add Donation" button is present.

ID	Date	Campaign	Amount	Type	Status	Restriction	Memorial Name	Published Name / Note	Ack
512	11/20/2020	Giving Tree	400.00	Check	Received	Giving Tree			

Below the table are buttons for "Delete", "Scan", and "Print".

The donation ID number 512 which has been created by the system is written on the back of the check that is scanned and placed in a folder of checks recently received.

# Entering Donations Received

A check for \$500 is received for a donation in memory of a loved one without an indication of how the money should be spent. That entry is created and the memorial name is included.

The screenshot shows a web application interface for managing donors and donations. The main section is titled "Conference Donors" and shows 105 of 266 donors. The donor selected is Mr. & Mrs. William Foster, located at 705 Southeast Lane, Middleboro, MA 02346. The interface includes search filters for "Find by Last Name" (Foster) and "Find by Organization". There are navigation buttons (Add, Update, Delete) and a "Campaign Appeals" section with checkboxes for "Golf Tournament", "Annual Appeal", "Food Pantry 5K", and "Giving Tree".

**Donations**

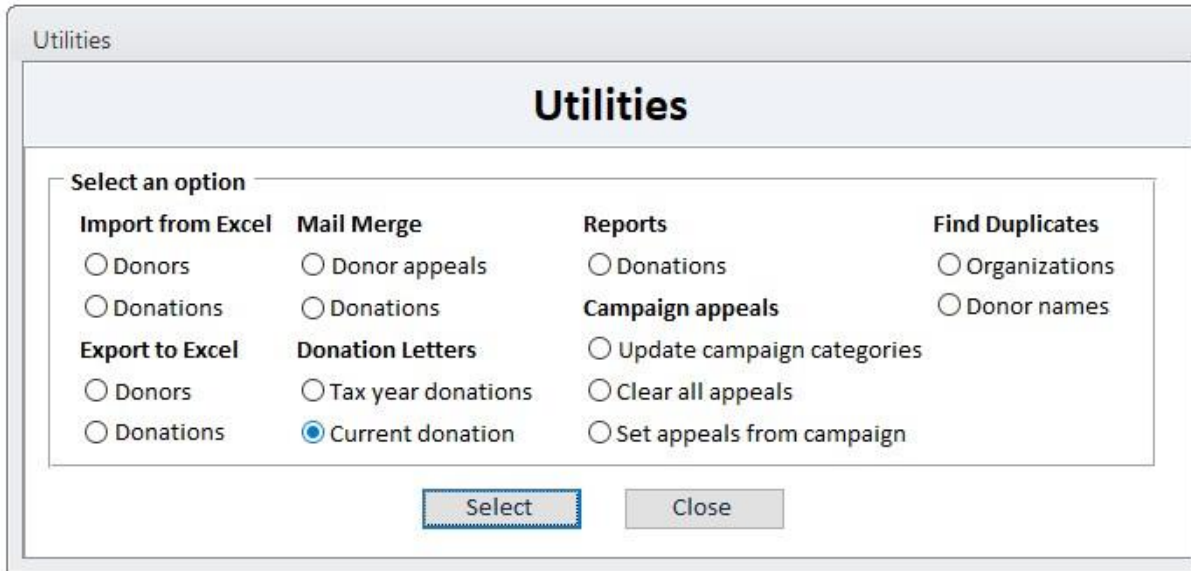
Total: \$650.00      Past 12 months: \$650.00      Add Donation

ID	Date	Campaign	Amount	Type	Status	Restriction	Memorial Name	Published Name / Note	Ack
141	6/22/2021	None	500.00	Check	Received	None	Kenneth Foster		<input type="checkbox"/>
140	5/8/2021	None	25.00	Check	Received	None			<input checked="" type="checkbox"/>
147	4/10/2021	None	50.00	Check	Received	None			<input checked="" type="checkbox"/>

The donation ID number 141 which has been created by the system is written on the back of the check that is scanned and placed in a folder of checks recently received.

# Donation Acknowledgement Letters

It is time to create the acknowledgement letters to the various donors. The user selects Donation Letters from the Utilities form.



The screenshot shows a window titled "Utilities" with a sub-header "Utilities". Below the header is a section titled "Select an option" containing a grid of radio button options. The "Donation Letters" option is selected. At the bottom of the window are two buttons: "Select" and "Close".

Import from Excel	Mail Merge	Reports	Find Duplicates
<input type="radio"/> Donors	<input type="radio"/> Donor appeals	<input type="radio"/> Donations	<input type="radio"/> Organizations
<input type="radio"/> Donations	<input type="radio"/> Donations	<b>Campaign appeals</b>	<input type="radio"/> Donor names
Export to Excel	Donation Letters	<input type="radio"/> Update campaign categories	
<input type="radio"/> Donors	<input type="radio"/> Tax year donations	<input type="radio"/> Clear all appeals	
<input type="radio"/> Donations	<input checked="" type="radio"/> Current donation	<input type="radio"/> Set appeals from campaign	

The letters meets the criteria for acknowledgement of tax deductible contributions to a non-profit organization and includes the intended function for which the donation is intended and the memorial name as indicated.



The Society of St. Vincent de Paul  
P.O. Box 1234  
Brockton, MA 02301

Tuesday, June 15, 2021

Mr. & Mrs. William Foster  
705 Southeast Lane  
Middleboro, MA 02346

Dear Mr. & Mrs. Foster,

Thank you for your contribution of \$500.00 in memory of Kenneth Foster. Your generosity enables us to continue to provide needed assistance to hundreds of households in the city of Brockton. Thank you for your continued support of our ministry to those in need.

This letter acknowledges your contribution for federal income tax purposes. No goods or services were provided in exchange for your contribution. The Society of St. Vincent de Paul is a non-profit, 501(c)(3) service organization. Please retain this letter as proof of your charitable contribution.

Sincerely,

*Susan O'Connor*

Susan O'Connor, Secretary



The Society of St. Vincent de Paul  
P.O. Box 1234  
Brockton, MA 02301

Tuesday, June 15, 2021

Santander Bank  
77 Centre Street  
Middleboro, MA 02346

Dear Friend,

Thank you for your contribution of \$400.00 in support of the Giving Tree.

Your generosity enables us to continue to provide needed assistance to hundreds of households in the city of Brockton. Thank you for your continued support of our ministry to those in need.

This letter acknowledges your contribution for federal income tax purposes. No goods or services were provided in exchange for your contribution. The Society of St. Vincent de Paul is a non-profit, 501(c)(3) service organization. Please retain this letter as proof of your charitable contribution.

Sincerely,

*Susan O'Connor*

Susan O'Connor, Secretary

# Exporting Donations to a Spreadsheet / CSV File

It is time to send the checks to the treasurer. In the donation system, the user opens the Utilities form, selects Export Donations and enters the current year.

The image shows a screenshot of a web application interface. In the background, there is a window titled "Utilities" with a sub-header "Utilities". Below the header, there is a section titled "Select an option" with two columns of radio button options. The first column is labeled "Import from Excel" and contains "Donors" and "Donations". The second column is labeled "Mail Merge" and contains "Donor appeals" and "Donations". Below these columns is a "Select" button. In the foreground, there is a dialog box titled "Donor Contribution Mailing" with a sub-header "Export Detailed Contributions to Excel". Below the sub-header, there is a section titled "Export each contribution within the defined timeframe" with a "Timeframe" section containing a "Year:" field with the value "2021", an "or" label, and "Start Date:" and "End Date:" fields. At the bottom of the dialog box are "OK" and "Cancel" buttons.

Utilities

## Utilities

Select an option

**Import from Excel**

Donors

Donations

**Export to Excel**

Donors

Donations

**Mail Merge**

Donor appeals

Donations

**Donation Letters**

Tax year donations

Current donation

Select

Donor Contribution Mailing

### Export Detailed Contributions to Excel

Export each contribution within the defined timeframe

Timeframe

Year: 2021

or

Start Date:

End Date:

OK Cancel





# Conference Reports

Periodically, reports can be generated with year to date summary statistics.

## Monthly Donations 1/1/2014 thru 12/31/2014

Month	Total Count	Total Amount	Food Pantry 5K	Italian Dinner	Golf Tournament	Giving Tree	Holiday Meal
Jan 2014	22	\$1,560	\$0	\$0	\$0	\$0	\$0
Feb 2014	33	\$3,020	\$0	\$0	\$0	\$0	\$0
Mar 2014	46	\$5,075	\$0	\$0	\$960	\$0	\$0
Apr 2014	36	\$2,760	\$0	\$0	\$650	\$0	\$0
May 2014	36	\$2,920	\$0	\$0	\$300	\$0	\$0
Jun 2014	25	\$2,255	\$0	\$0	\$0	\$0	\$0
Jul 2014	31	\$4,030	\$2,000	\$0	\$0	\$0	\$0
Aug 2014	44	\$5,505	\$3,000	\$0	\$0	\$0	\$0
Sep 2014	33	\$7,675	\$5,250	\$0	\$0	\$0	\$0
Oct 2014	29	\$2,309	\$0	\$0	\$0	\$0	\$0
Nov 2014	41	\$6,625	\$0	\$0	\$0	\$1,000	\$200
Dec 2014	112	\$26,056	\$0	\$0	\$0	\$1,500	\$0
<b>Grand Total</b>	<b>488</b>	<b>\$69,790</b>	<b>\$10,250</b>	<b>\$0</b>	<b>\$1,910</b>	<b>\$2,500</b>	<b>\$200</b>

# Year End Tax Letters

Year-end tax letters and corresponding mailing labels can be generated by selecting Utilities, Tax Year letters



The Society of St. Vincent de Paul  
P.O. Box 1381  
Middleboro, MA 02346

Wednesday, June 16, 2021

Mr. & Mrs. William Foster  
705 Southeast Lane  
Middleboro, MA 02346

Dear Mr. & Mrs. Foster,

On behalf of The Society of St. Vincent de Paul, we are so grateful for your support during 2021. Your total contribution for 2021 equals \$650.00.

Your generosity enables us to continue to provide needed assistance to hundreds of households in the local community. Thank you for your continued support of our ministry to those in need.

This letter acknowledges your contribution for federal income tax purposes. No goods or services were provided in exchange for your contribution. The Society of St. Vincent de Paul is a non-profit, 501(c)(3) service organization. Please retain this letter as proof of your charitable contribution.

Sincerely,

*Dick Amber*

Dick Amber, Secretary

# Fund raising campaigns

The system support fund raising campaigns based on the contribution history of donors. Selecting Donor appeals from the Utilities form will generate spreadsheet files of potential contributors (based on their donation history) which can be used as a mail-merge file for a donation request letter.

The image shows a software interface with two windows. The main window is titled "Utilities" and contains a "Select an option" section with three columns of radio buttons. The "Mail Merge" column has "Donor appeals" selected. A "Select" button is at the bottom. A smaller dialog box titled "Campaign Appeal Mailing" is overlaid on top, showing two checked options: "Export contributions to Excel for mail merge" and "Print donor mailing labels". It also has a "Campaign:" dropdown menu set to "Giving Tree" and "OK" and "Cancel" buttons.

Utilities

## Utilities

Select an option

<b>Import from Excel</b>	<b>Mail Merge</b>	<b>Re</b>
<input type="radio"/> Donors	<input checked="" type="radio"/> Donor appeals	<input type="radio"/>
<input type="radio"/> Donations	<input type="radio"/> Donations	<b>Car</b>
<b>Export to Excel</b>	<b>Donation Letters</b>	<input type="radio"/>
<input type="radio"/> Donors	<input type="radio"/> Tax year donations	<input type="radio"/>
<input type="radio"/> Donations	<input type="radio"/> Current donation	<input type="radio"/>

Select

### Campaign Appeal Mailing

Option

- Export contributions to Excel for mail merge
- Print donor mailing labels

Campaign: Giving Tree

OK Cancel

## **Other benefits**

The system can act as a second set of books that can be used as a tool to provide a level of oversight and to reconcile data discrepancies in the accounting system.