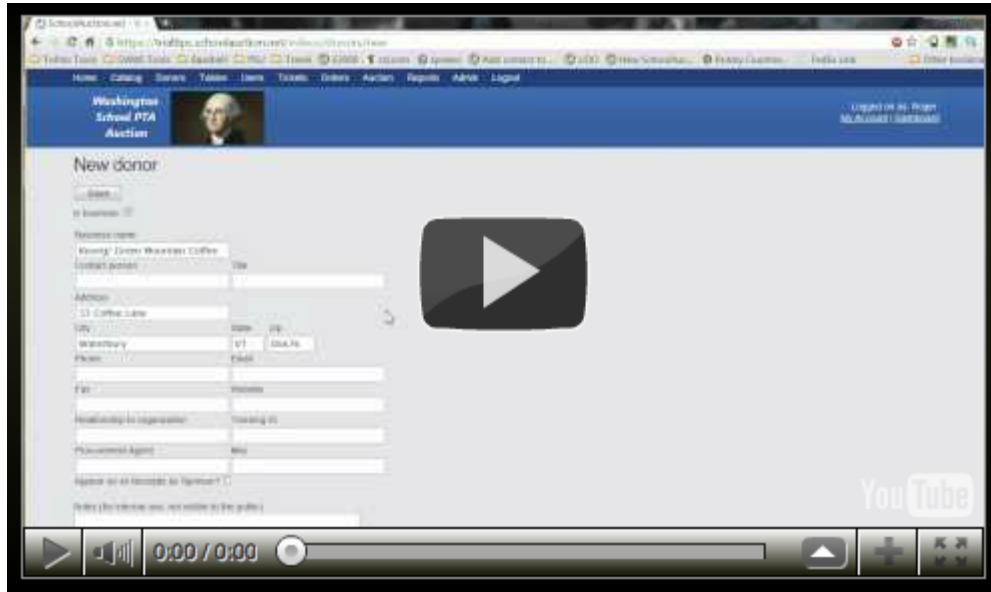


Adding Donors

VIDEOS: ENTERING DONORS



Signing on and Getting There

Donors [Add New Donor](#)

Donor Search

Businesses & Individuals [Show Advanced](#)

or [Reset Search](#)

Displaying all 3 Donors

1. Login
2. Click on Donor tab.
3. Click on **Add New Donor**

Inputting the Data

New donor

Is business: **1**

Business name **2**

Contact person Title

Address

City State Zip

Phone Email

Relationship to organization Tracking ID **3**

Procurement Agent **4** Misc

Appear on all Receipts as Sponsor? **5**

Notes (for internal use, not visible to the public)

Italicized fields only visible to those who are logged in.

1. Clicking on **Is business** box will generate a *contact person and title*.
2. Name is only required field.
3. *Tracking ID* is meant as a means to keep data integrity if you are importing and exporting a data set. Each ID must be unique.
4. *Procurement Agent* transfer to *Solicitor* in the *Item Edit* detail screen.
5. Clicking on **Appear on all Receipts as Sponsor ?** box will place name and address on bottom of each receipt..

Extended Information Added for Donors to be Visible

Make donor visible to the public: ①

Website

Bio Page
 ②

Fax

Phone Secondary

Email Secondary

Instant Message

Is active:

③

1. To make Donor visible to guests without logon, click on **Make donor to visible to public:** box.
2. Description can include html coding and link to donor's web site.
3. **Save.**