

Support Webinar Managing Gifts

Agenda

- Best Practices: Entering a Gift
- Gifts vs. Gift Payments
- Reviewing Gift Payments Before Sending to Accounting
- Sending Payments to Accounting in Bulk
- Gift Payment Data Synced from BC to akoyaGO
- Gift Acknowledgements: Letters
- Managing Gifts Process: Overview

Best Practices: Entering a Gift

- Gifts *must* be tied to a Donor record
- **Step 1: Use Dataverse Search to look for Donor**
 - Check to see if the Donor exists in akoyaGO
 - Verify and review:
 - Up-to-date contact details
 - Connected Contact records
 - Mailing address
 - Gift history

Best Practices: Entering a Gift

- **Step 2:** Create the Donor record and any Contact or Constituent records needed

Best Practices: Entering a Gift

- **Step 3: Create the Gift and Gift Payment using Quick Create Form**
 - Click "Gift" tab on the Donor record and select +New Gift to open the Gift - Quick Create form
 - Ensure all required fields are filled in:
 - Donor, Gift Date, Commitment, Gift Type, Payment Type, and Fund
 - Complete additional fields based on criteria
 - Pledge gifts
 - Multi-payment gifts
 - Create one gift record, multiple gift payment records

Gift vs. Gift Payment



Gift

- Tracks \$ committed to your foundation by a Donor
- Primary record that shows the full picture of the gift or pledge



Gift Payment

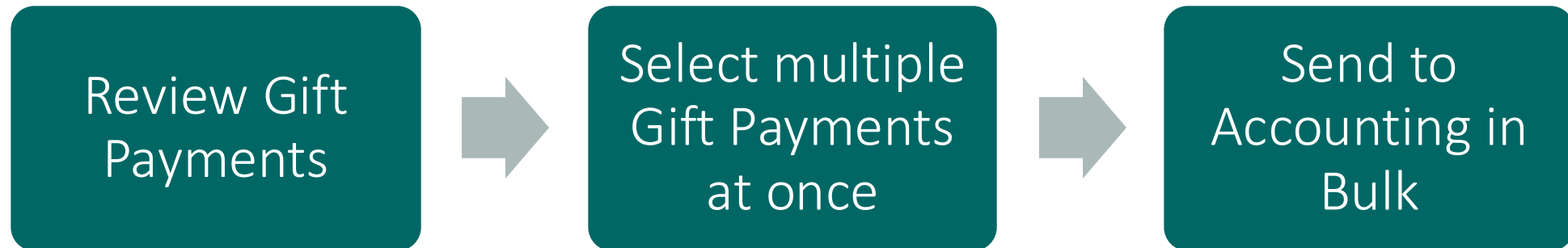
- Records of the Payments that will pay for the donations
- Sent to Accounting
- Create the lines in your General Ledger
- Contain financial data – account, fund, etc.

Reviewing Gift Payments Before Sending to Accounting

- **Step 4: Review "Gift Payments to Send to Accounting View"**
 - This view shows all Gift Payments that have not yet been sent to Business Central (BC)
 - Review the Gift Payments before sending to BC:
 - Amount
 - Account (Gift defaults from Accounting Settings)
 - Fund
 - Handling Notes

Sending Payments to Accounting in Bulk

- Step 5: Use "Gift Payments to Send to Accounting" view to send multiple Gift Payments at once



Gift Payment Data Synced from BC to akoyaGO

- A Gift Payment's "Payment Status" tells me where it stands in Business Central

Blank	Error	Received	Deposited
<ul style="list-style-type: none">• Gift Payment has not yet been sent to accounting	<ul style="list-style-type: none">• An error occurred when the Gift Payment was sent to Accounting, and it has not yet been sent	<ul style="list-style-type: none">• The Gift Payment has been received in Business Central	<ul style="list-style-type: none">• The gift has been marked Deposited in Business Central (i.e. I've deposited this gift in the real world and have marked it that way in BC)

Gift Acknowledgements: Letters

- **Step 6: Generate Letters and bulk update Gifts or Gift Payments**

Gift

- Use Date Acknowledged field to track
- System View: Gifts to be Acknowledged
- Letter contains info about the full contribution only

Gift Payment

- Use Thank-you Date field to track
- System View: Gift Payments with no Thank-you Date
- Letter contains payment specific information (i.e. Fund)

Managing Gifts Process: Overview

Step 1:

- Search for Donor using Dataverse

Step 2:

- Select existing or create new Donor record

Step 3:

- Create the Gift and Gift Payment using Quick Create Form

Step 4:

- Review "Gift Payments to Send to Accounting View"

Step 5:

- Use "Gift Payments to Send to Accounting" to send Payments to BC

Step 6:

- Generate Letters and bulk update Gifts or Gift Payments

Resources

- Gift Quick Create Form – ensuring it's turned on:
<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01068/en-us>
- Generating Letters -
<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01563>
- Pledge Payments -
<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01111/en-us>

Thank you!

akoyago