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Supporter Donation System Quick Tips
Batch Payment Entry

The Batch Payment Entry screen is used to enter batches of money received in either cash or checks for your Appeals.

This Entry screen is sizable by width - click and drag the right edge of the screen and adjust it to the size that you like.

Follow these steps to enter a batch of checks or cash payments:
1. Click on the Configure Screen button at the bottom and choose which items you would like to see or hide during the batch entry of your payments
2. Click the Start New Batch button on the bottom
3. Today's date will automatically populate in the date column
4. Tab into the Supporters field type the first couple of letters of the supporters last name and a dropdown list will appear and you will be in that area of your complete supporters list
5. Choose your supporter from the list by using your up or down arrows and then push the tab key on your keyboard
    NOTE: this will choose your supporter and move you to the Camp/Appeal/Sub-Appeal list
    If the supporter is not in the database, you will be directed to the Supporter Search screen where you will be able to search further or click Add Supporter to add them to the database
6. Choose the Camp/Appeal/Sub-Appeal that this payment is being made to, tab to the next field
7. Fill in the dollar amount, tab to the next field
8. Fill in the MOP, tab to the next field
9. Fill in the Check # if applicable, tab to the next field
10. Fill in the Check Dt (Date) if applicable
    NOTE: type a T for today's date
                + to go forward a day
                - to go backwards a day
                or C and a Calendar will appear
11. Tab to the next field
12. Check the Letter checkbox if you want to send a Letter when you are finished with the batch
13. Tab to the next line
14. Follow steps 4 to 13 for each payment that you have received
15. After all payments have been entered, click on Post the Batch
    NOTE: Once a Payment has been posted you can NOT change or delete the entry here
16. Click on the Print Report button after the batch has been posted to get an exact list of the data that was entered
17. Click on the Print Letter button to send a Thank You letter to the supporters who you have just recorded payments for