

Contributions to Donations Quick Reference Guide

In Contributions...	In Donations...
Enter Contributions	Enter Donations
Envelope #s assigned to an Individual only	Giver #s may be assigned to an Individual, a Family or a Group/Class – Givers>Add Individual or Group
Envelope #s required	Giver #s optional
Visitors added in Membership	Can add Givers directly in Donations (they will not appear in Membership!)
Cannot import direct deposit EFT giving	Can import direct deposit EFT giving directly to Donations (currently Vanco, Authorize.net and Ardent) Donations>Import Donations
Show Batch appears as a separate box	Batch shows up on the bottom of the Enter Donations screen
End-of-Year Procedure	No calendar year close so there is no End-of-Year Procedure
Transfer Contributions to Accounting must be done in the Accounting module	Transfer to Accounting may be done in Donations by clicking Post & Transfer on the Enter Donation screen
Labels for envelope boxes must be printed through Membership	Labels are printed through Donations by going to Reports/Export >Lists/Labels
Envelope number export for the envelope box company	Reports/Export >Lists/Labels>Labels>Print Labels>Export
Security is limited	Granular Security – Clear audit trail to track the input of Donations as well as any data changes
Limited to 3 yearly pledge drives and 2 multiyear pledge drives	Unlimited pledge accounts/campaigns and time periods
No ability to change date ranges of pledge drives	Date ranges of pledge accounts/campaigns may be edited/changed
Giving may be corrected in Browse/Edit but no audit trail	Browse Donations has a Correct and Reverse feature which retains an audit trail
No ability to export and email Contribution reports	Reports may be exported and emailed
Report columns and/or formatting cannot be changed	Columns may be added, sorted and the formatting may be Saved
REPORTS	
Batch Report	Anytime while entering giving, a Batch Report may be printed by pressing the Print button. After donations are entered and posted a Batch report can be printed
Giving Summary	Go to Reports/Export>Donation Reports>Giving Summary
Giving Statement	Donation Statement
Giving Statement layout cannot be changed	Donation Statements has a Layout Designer which allows changes to the layout
Envelope Number List	Reports/Export>Lists & Labels>List Giver #s
Pledge/Giving	Reports/Export>Compare & Analyze>Pledge Giving Analysis