

How to Add Gift Benefits in Batch

When entering gifts that include a benefit, i.e. tickets or holiday cards, it is important to add the benefit to the gift record. Doing this will modify the receipt amount for letters that include the receipt field and year end statements.

1. Create a gift batch
2. Enter the donor and gift to the record

Batch 10569

Constituent ID	Constituent Name	Date	Amount	Receipt amount	Pay method	Check number	Fund/GL	Appeal/Solicitation	Package	Reference	Letter code	Acknowledge	GL post date
45882	Chomsky, Susan	1/9/2017	\$500.00	\$500.00	Personal Check	1111	51109 - Holiday Cards	Holiday Cards	5 packages		New Thank You	Not Acknowledged	1/9/2017

3. Select > Gift in the menu bar
4. Select > Benefits
5. The Benefits screen opens

Benefits

Enter goods, services, or benefits received by the constituent.

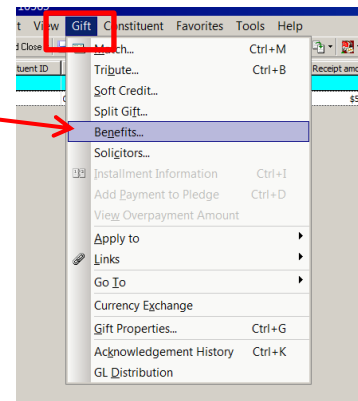
Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
		\$25.00	\$0.00		

Load From: Total: \$0.00

Notes:

☐ Include notes on receipt

OK Cancel



6. Select the benefit from the drop down list and add the number (count)

Benefit	Count	Unit Cost	Total Benefit/Value
Holiday Card Pack	5	\$6.00	\$30.00

7. You might get a confirmation pop-up
Click YES and continue

The Raiser's Edge

The total benefit value has changed. Do you wish to update the receipt amount to reflect these changes?

The new receipt amount would be \$476.00.

Yes No Cancel

Gift for Susan Chomsky 45882

Gift type: Recurring Gift Pay-Cash Reference: EFT 0007M12/20/2016

Gift subtype: Credit Card Acknowledge: Acknowledged 12/22/2016

Gift date: 12/20/2016 Letter: Not Received

Amount: \$25.00 Receipt amt./no.: \$25.00

Campaign: Receipt

Benefits

Enter goods, services, or benefits received by the constituent.

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments

Load From: Total: \$0.00

Notes:

☐ Include notes on receipt

OK Cancel

IF the batch is already committed the benefits can be added by selecting the "Benefits" button on the gift record

Comedy Night 2017			
Level	#Tkts	Cost	FMV
Benefactor	30	\$50,000	\$48,000
Side Splitting	20	\$25,000	\$24,000
Chortle	16	\$15,000	\$14,200
Hoot	12	\$10,000	\$9,400
Cackle	10	\$5,000	\$4,500
Chuckle	6	\$2,500	\$2,200
Giggle	4	\$1,000	\$800
Snicker	2	\$500	\$400
Ticket	1	\$100	\$50