

# TheRaiser'sEdge<sup>®</sup> Enterprise<sup>™</sup>

Event Gifts Guide

**100908**

©2008 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7Enterprise-GiftEventUK-100908

# Event Gifts Guide

GIFTS FOR EVENTS .....	1
<b>Frequently Used Terms</b> .....	2
<b>Navigating in Events</b> .....	3
<b>Event Business Rules</b> .....	5
<b>Understanding Event Gifts</b> .....	7
<b>Registration Fees</b> .....	8
<b>Other Donations</b> .....	15
<b>Sponsoring Pledges</b> .....	27
<b>Breaking the Link between a Gift and an Event</b> .....	43
INDEX .....	49

Contents

\_\_\_\_\_



## What Is In This Guide?

In the *Event Gifts Guide*, you learn to add, edit, and delete event gift records. You can also learn about the following.

- “Linking a gift to pay existing registration fees from a gift batch” on page 13
- “Linking a constituent’s gift to another person’s participant record as an other donation from a gift record” on page 22
- “Adding a sponsoring pledge from a gift record” on page 29
- “Paying an existing sponsoring pledge from a gift batch” on page 41



## How Do I Use These Guides?

*The Raiser’s Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.co.uk](http://www.blackbaud.co.uk). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

W e l c o m e

## Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

# Gifts for Events

## Contents

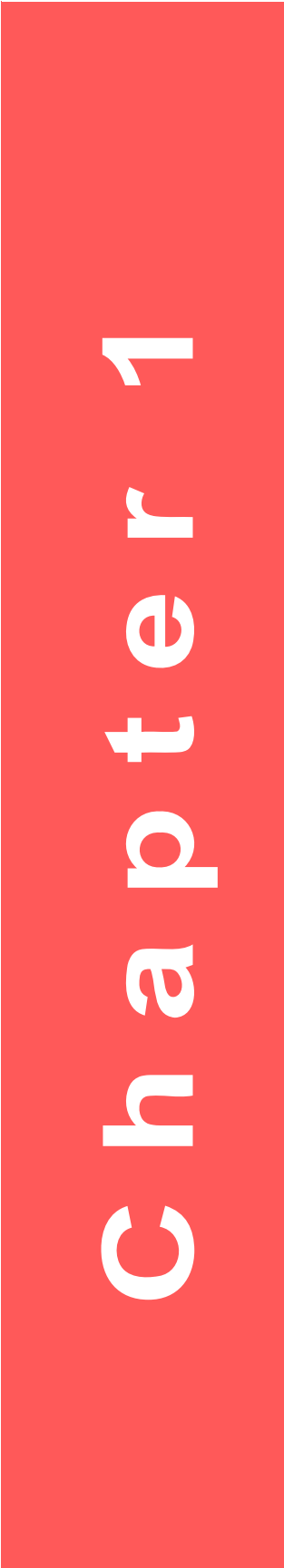
---

- Frequently Used Terms** ..... 2
- Navigating in Events.** ..... 3
- Accessing Event Gifts. .... 4
- Toolbar ..... 4
- Event Business Rules** ..... 5
- Understanding Event Gifts** ..... 7
- Registration Fees.** ..... 8
- Linking a Gift to Pay Existing Registration Fees ..... 9
- Other Donations** ..... 15
- Linking a Gift to an Event as an Other Donation ..... 15
- Sponsoring Pledges.** ..... 27
- Adding a Sponsoring Pledge for an Existing Participant ..... 28
- Paying an Existing Sponsoring Pledge ..... 35
- Breaking the Link between a Gift and an Event** ..... 43

## Procedures

---

- Defining business rules. .... 6
- Linking a gift to pay existing registration fees from a gift record ..... 9
- Linking a gift to pay existing registration fees from a gift batch ..... 13
- Linking a gift record to an event as an other donation from a gift record ..... 16
- Linking a gift record to an event as an other donation from a gift batch ..... 20
- Linking a constituent’s gift to another person’s participant record as an other donation from a gift record ..... 22
- Linking a constituent’s gift to another person’s participant record as an other donation from a gift batch ..... 26
- Adding a sponsoring pledge from a gift record ..... 29
- Adding a sponsoring pledge from a gift batch ..... 33
- Paying an existing sponsoring pledge from a gift record ..... 36
- Paying a sponsoring pledge for a pledge entered in a gift batch ..... 39
- Paying an existing sponsoring pledge from a gift batch. .... 41
- Breaking a link between a gift and participant record from a gift record. .... 44



*Event Management*, Blackbaud's events tracking module, works in conjunction with *The Raiser's Edge Enterprise* to help manage all aspects of your events. Whether you are organising a golf tournament, an awards banquet, a training class for your volunteers, or an afternoon tea, the information you need — from registrant lists and expenses to income generated — is kept in one package.

With *Event Management*, event gifts, such as registration fees, donations, and sponsoring pledges, can be entered from a participant or gift record. Once you add a gift record for an event gift, you can link the gift record to a participant record for the individual or organisation which is associated with the gift. When you use the linking capability, you can easily track from the participant record whether registration fees have been paid, other donations have been made, or sponsoring pledges have been fulfilled.

A gift record can be linked to a participant record from the gift record or the participant record. This book explains all aspects of linking a gift record to an event from a gift record and from a gift batch. For more information about the other features of *Event Management*, see the *Event Management Data Entry Guide*.

## Frequently Used Terms

This section defines words and phrases you need to know as you work with *Event Management*. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

**Participant.** A participant is an individual or organisation associated with an event. For example, if you are hosting a formal dinner event, the participants are the attendees, the caterer, speakers, coordinators, and volunteers associated with the dinner event. Each participant must be entered as a registrant, guest, or sponsor on the event record for the dinner.

**Registrant.** A registrant is an individual or organisation attending or providing a service or product for an event. A registrant can participate in the event, but does not have to. For example, you are giving a CPR class and invite a local doctor to give a speech on strokes. The doctor does not pay registration fees like the students of the class, but you need to enter the doctor in the database as a registrant to track any expenses paid for the doctor's services and to track the doctor as a speaker for the CPR class. The students of the CPR class are also entered as registrants because they participate in the class as students. You need to track their names, addresses, attendance, registration fees, seating arrangements, and other important information.

**Guest.** A guest is an individual or organisation attending an event as an invitee (guest) of a registrant. For example, you enter Jane Cothran as a registrant for your organisation's golf tournament. She decides to bring a friend, Bill Cone, whom you enter in the database as a guest.

**Sponsor.** A sponsor is an individual or organisation sponsoring or representing a registrant. For example, your organisation is holding a tennis tournament. The Northern Tennis company sponsors a team in the tournament by representing the team and paying the registration fees for each player. You enter the Northern Tennis company as a sponsor.



**Registration fees.** A registration fee is the monetary amount a participant must pay to attend the event. For example, your organisation is holding a golf tournament and each individual participating in the tournament must pay a registration fee of £50.00. This fee can cover any costs for the event, as well as a donation to your organisation. For the golf tournament registration fee, £20.00 may cover the cost of the event and £30.00 may be a donation to your organisation.

**Other donations.** An other donation is a gift made to an event by a constituent in your database. For example, a company that is sponsoring 10 participants in your event may choose to make an additional donation to support the event. Because the company's gift is associated with the event, you can link the gift record for the additional donation to the company's participant record as an "other donation".

**Sponsoring pledges.** A sponsoring pledge is a donation made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, if you are hosting a marathon, the participants can encourage donations based on the distance they are able to run. You can enter these donations in the database as sponsoring pledges.

## Navigating in Events

From the Gifts page, you can create new gift records for the gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Other, and Legacy Gift. After you create a gift record for event registration fees, donations, or sponsoring pledges, you can access the gift record from the Gifts page. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.

The screenshot shows the 'The Raiser's Edge' application window. The title bar reads 'The Raiser's Edge'. The menu bar includes 'File', 'Edit', 'View', 'Go', 'Favourites', 'Tools', and 'Help'. Below the menu bar are navigation buttons for 'Back', 'Forward', and 'Open in separate window'. On the left is a vertical navigation menu with icons and labels: Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSoluti..., and Dashbo... The main content area is titled 'Records • Gifts' and contains a 'Gifts' section. This section has two buttons: 'New Gift' and 'Open a Gift'. Below these buttons is a 'Recently Accessed Records' section with a list of gift transactions. To the right of this list is a 'Quick Find' section with a search input field and a search icon. At the bottom right of the main content area is a graphic of a stack of papers.

Recently Accessed Records
30/04/2000 Cash £15.00 - Heather L Faulkner
13/01/1999 Stock/Property £1,800.00 - ABC Learning Centre
25/05/2000 Pay-Other £45.00 - Catlin R Daly
15/12/1999 Stock/Property £850.00 - Christopher T Young
13/07/2002 Cash £2,000.00 - Christopher T Young
19/05/2001 Pay-Cash £455.00 - Catlin R Daly
22/07/2003 Stock/Property £1,000.00 - ABC Learning Center
07/01/2003 Cash £11,000.00 - Susan E McDonald
01/04/2002 Cash £200.00 - Keith D Radcliffe
04/02/2003 Cash £40.00 - Jeffrey P Ferber

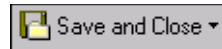
The Gifts page contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

## Accessing Event Gifts

After you create a gift record for event registration fees, donations, or sponsoring pledges, you can open the gift record from the Records page or the Gifts tab of the donor's constituent record the same way you open any other type of gift record. For more information about opening a gift record from the Records page, see the Gift Record chapter of the *Gift Records Guide*. For more information about opening a gift record from the Gifts tab of a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

## Toolbar

The toolbar contains buttons representing common commands on a gift record. You can use these buttons as alternatives to menu commands to save time during data entry.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)



Save the gift record



Preview a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record



Print a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record



View the first gift record listed on the Gifts tab of a constituent record for the donor of the current gift record



View the previous gift record listed on the Gifts tab of a constituent record for the donor of the current gift record



View the next gift record listed on the Gifts tab of a constituent record for the donor of the current gift record



View the last gift record listed on the Gifts tab of a constituent record for the donor of the current gift record



Go to a record linked to the current gift record



Apply gift record to existing pledge or recurring gift



Link gift to membership, event, or proposal



Add gift record to favourites



View the Gift Properties screen




Access help contents



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only when you have the optional module *VBA for Advanced Customisation*.

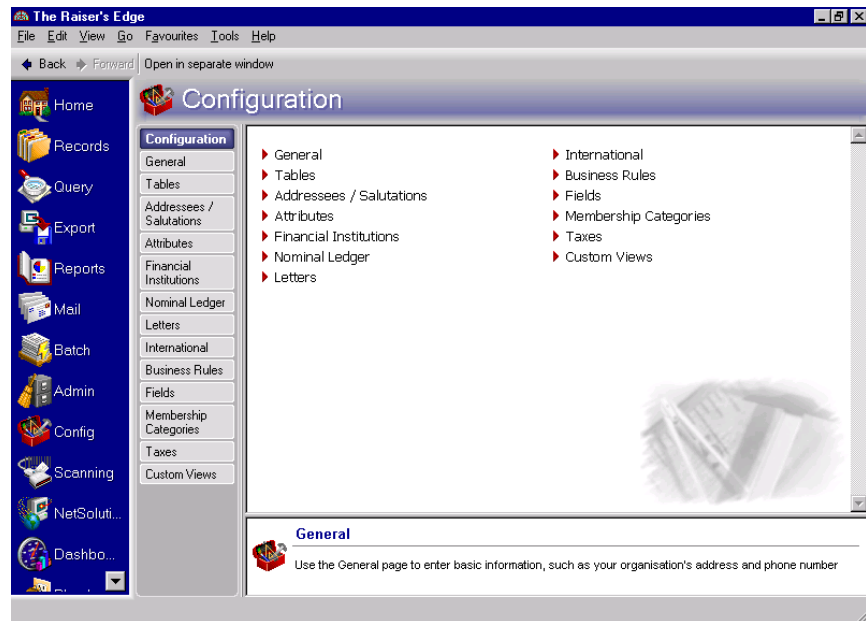
## Event Business Rules


By setting business rules, you can control certain functions and displays throughout *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules are specific to *Event Management*. When you add a participant to an event, the program can automatically create a gift record for registration fees, ask if you want to create a gift record for registration fees, or do neither. When adding gifts to your database, the program can also warn you when a constituent has outstanding registration fees. For complete information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

 If the **Gift options** folder is closed, double-click the folder name to open the folder.

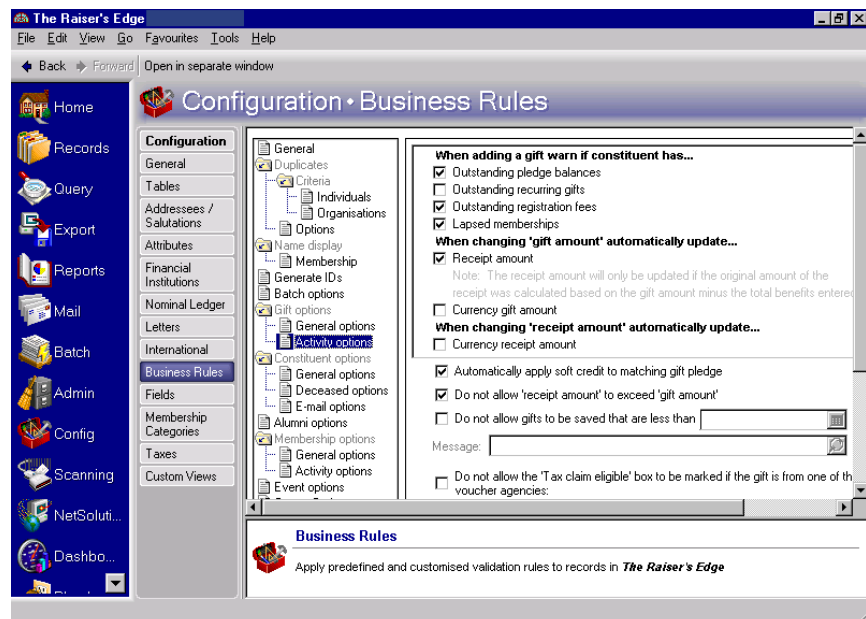
## ➤ Defining business rules

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



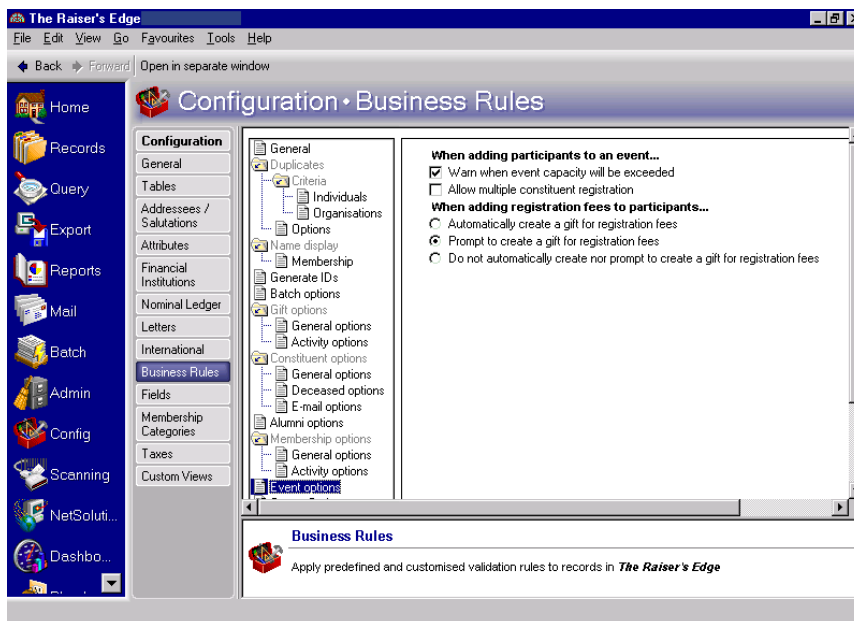
 To define business rules, you must have security rights. For more information, see the Security chapter of the *Configuration & Security Guide*.

2. Click **Business Rules**. The Business Rules page appears.
3. From the tree view on the left, select **Activity options** in the **Gift options** folder. The Business Rules screen now appears with the gift-related options.




4. Under **When adding a gift warn if constituent has**, check the **Outstanding registration fees** checkbox if you want to be reminded when you add a gift for a constituent who has outstanding registration fees.

- From the tree view on the left, select **Event options**. The Business Rules screen now appears with the event-related options.



- Under **When adding registration fees to participants**, select if you want the program to automatically create a gift record for registration fees, ask if you want to create a gift record for registration fees, or neither.
- After you make changes to business rules, your preferences are updated right away.

 Your selection for **When adding registration fees to participants** should depend on your data entry methods. For example, if you decide to add participants to your database only after receiving registration fees, you can check the **Automatically create a gift for registration fees** option to save time during data entry.

## Understanding Event Gifts

Gifts can be associated with participant records in three ways: to pay registration fees, track donations, and record sponsoring pledges. When you receive registration fees, sponsoring pledges, or other donations, you need to create a gift record to record gift information. Gift information can include the campaign, fund, appeal, and package to which the gift should be attributed; the payment method for the gift; and the canvasser responsible for obtaining the gift. After you create a gift record, you need to link the gift record to the participant record of the individual or organisation who is associated with the gift.

For example, if John Smith paid a registration fee of £20 for an upcoming event, you need to create a gift record for John's registration fee. After entering the appropriate information on the gift record, you need to link the gift record to John Smith's participant record. When you link a gift and participant record, you are showing John Smith paid his registration fee for a particular event. Once you link a gift record and a participant record, information about the gift can be viewed and tracked from the participant record.

The next sections explain details related to linking a gift record for registration fees, sponsoring pledges, or other donations for a participant record. For basic information about the fields and options available on a gift record, see the Gift Record chapter of the *Gift Records Guide*.

# Registration Fees

When you add a participant to an event, you can enter registration fees that must be paid before the participant can attend the event. For example, your organisation is holding a CPR class this summer. Each student in the class must pay £75 to cover the cost of books and instruction. When you add a participant for the CPR class, you can enter the registration fees due for the class on the Registration Fees tab of the participant record.

The screenshot shows the 'Nick Vaughn (Sponsor)' window with the 'Registration Fees' tab selected. The 'Registrant' field contains 'Nick Vaughn'. Under 'Registered Events', 'CPR Training Session' is selected. The table below shows one entry:

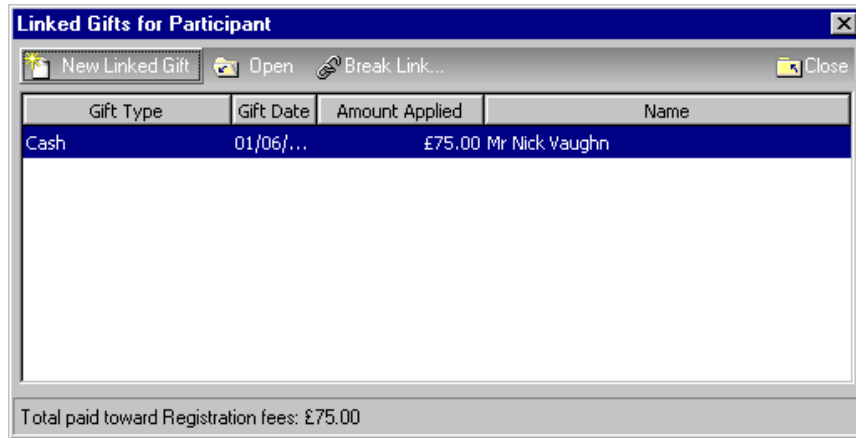
Unit	No. Units	Gift Amount	Receipt Amount	Date	Comments
Individual	1	£75.00	£25.00		

Below the table, there are fields for 'Amount paid' (£75.00) and 'Date paid'. The 'Total gift amount' is £75.00 and the 'Total receipt amount' is £25.00. A 'Class' button is visible at the bottom right.

To pay registration fees, you need to create a gift record and link the gift record to the participant record. For example, Nick Vaughn wants to attend the CPR class. You add a CPR class participant record for Nick and add a £75 registration fee on the Registration Fees tab. When you receive £75 from Nick, you need to create a gift record as normal. For more information about adding a gift record, see the Gift Record chapter of the *Gift Records Guide*.

After you create the gift record, you can link Nick's gift to his CPR class participant record to show he paid his registration fees. Once you link a gift record to a participant record, the **Amount paid** and **Date paid** fields on the participant record update with information from the linked gift.

On the participant record, you can click the **View Gifts** button on the Registration Fees tab to view the gifts paying the registration fees for this event. When you click **View Gifts**, the Linked Gifts screen appears displaying all gifts linked to this participant record.



For more information about viewing linked gifts from a participant record, see the *Event Management Data Entry Guide*.

## Linking a Gift to Pay Existing Registration Fees

After you create a gift record for registration fees, you need to link the gift record to the participant record of the person attending the event. To pay registration fees, the participant must be a constituent in your database. If a participant who is not a constituent pays registration fees for an event, you must add the participant as a constituent before you can add a gift for the participant.

Any constituent can pay registration fees for another participant. For example, a parent and child may attend your event. You need to create separate participant records for the parent and child. However, the parent can send a single payment that you link to both participant records.

When linking a gift record to a participant record, you can add a gift record for the registration fees from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for registration fees to a participant record from the Gifts page and from a gift batch.

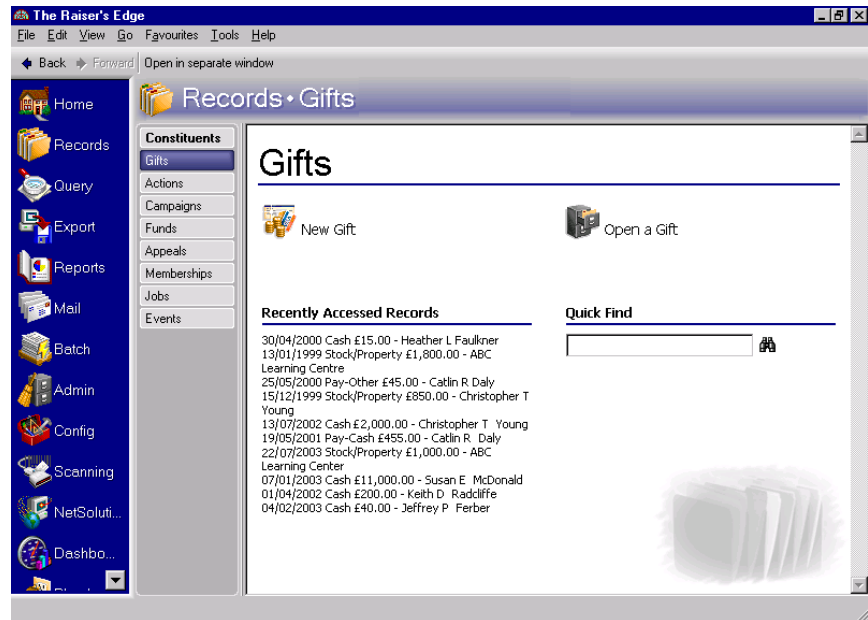
### ➤ Linking a gift to pay existing registration fees from a gift record




Nick Vaughn and his daughter, Jane, want to attend your Summer CPR class. You already created a participant record for both Nick and Jane and you added a £75 registration fee on the Registration Fees tab of both records. On 04/06/2004, you receive a cheque for £150 from Nick Vaughn to pay the registration fees for the CPR class. Now you need to create a gift record for Nick's fees and link the gift to both Nick and Jane's CPR class participant records.


1. On the Raiser's Edge bar, click **Records**.

2. Click the **Gifts** link. The Gifts page appears.



 If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

3. Click **New Gift**. The New Gift screen appears.

 Once you enter a name in the **Constituent** field, the program disables the field.


4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Nick Vaughn in the database. When you locate and select Nick, his name appears in the **Constituent** field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.



5. Select the Gift tab and add information about Nick's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

6. To link the gift to Nick and Jane's existing participant records, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Registration Fees**. The Pay Registration Fees screen appears.

Link?	Event ID	Date	Participant	Status	Attended	Amount Applied	Con:
<input type="checkbox"/>	Golf Tournament - 1...	31/07/1999	Nick Vaughn	Paid	<input checked="" type="checkbox"/>		Nick Ve
<input type="checkbox"/>	CPR Training Session	07/08/2004	Nick Vaughn	Paid	<input type="checkbox"/>		Nick Ve

 Because you entered Nick Vaughn in the **Constituent** field on the gift record, any existing registrations for Nick automatically appear on the Pay Registration Fees screen.

- Click **Load Registrations From**. The Open screen appears so you can locate Jane Vaughn in the database. When you locate Jane, all Jane's participant information appears in the grid on the Pay Registration Fees screen.

**Pay Registration Fees**

Pay registration fees with this gift by selecting 'Link?' next to the registration fees you wish to pay. Selecting 'Load Registration From...' will add registration fees for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £150.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Amount Applied	Con...
<input type="checkbox"/>	Golf Tournament - 1...	31/07/1999	Nick Vaughn	Paid	<input checked="" type="checkbox"/>		Nick Ve
<input type="checkbox"/>	CPR Training Session	07/08/2004	Nick Vaughn	Paid	<input type="checkbox"/>		Nick Ve
<input checked="" type="checkbox"/>	CPR Training Session	07/08/2004	Jane Vincent	Paid	<input type="checkbox"/>		Jane V

Load Registrations From...

Applied to Membership: £0.00 Applied: £0.00 Remaining: £150.00

OK Cancel

- In the **Link?** column, check the checkbox in the rows containing Nick and Jane's CPR class information.
- In the **Amount Applied** column for Nick and Jane's registration, enter the amount £75.

**Pay Registration Fees**

Pay registration fees with this gift by selecting 'Link?' next to the registration fees you wish to pay. Selecting 'Load Registration From...' will add registration fees for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £150.00

New Registration Open Participant Find...

Link?	Event ID	Participant	Status	Attended	Amount Applied
<input type="checkbox"/>	Golf Tournament - 1999	Mr Nick Vaughn	Paid	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	CPR Training Session	Mr Nick Vaughn	Paid	<input type="checkbox"/>	£75.00
<input checked="" type="checkbox"/>	CPR Training Session	Miss Jane Vincent	Paid	<input type="checkbox"/>	£75.00

Load Registrations From...

Applied to Membership: £0.00 Applied: £150.00 Remaining: £0.00

OK Cancel

- Click **OK**. You return to Nick's gift record.
- On the toolbar of the gift record, click **Save and Close**. Nick's gift record is added to your database and is now linked to both his and Jane's CPR class participant record to pay the registration fees.

## ➤ Linking a gift to pay existing registration fees from a gift batch



Nick Vaughn and his daughter Jane want to attend your Summer CPR class. You already created a participant record for both Nick and Jane and you added a £75 registration fee on the Registration Fees tab of both records. On 04/06/2004, you receive a cheque for £150 from Nick to pay the registration fees for the CPR class. Now, you need to create a gift record for Nick's fees and link the gift to both Nick and Jane's CPR class participant records.

1. From a gift batch, add a gift of £150 for Nick Vaughn as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal	NIL post date
Vaughn, Nick	£150.00	04/06/2004	Cash	Annual Campaign	Annual Fund	Millennium Direct ...	04/06/2004

Press F7 for search      Gift 1 of 1      Running Total: £0.00

2. With your cursor in the row of the batch containing Nick's gift, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Registration Fees**. The Pay Registration Fees screen appears.

Pay registration fees with this gift by selecting 'Link?' next to the registration fees you wish to pay. Selecting 'Load Registration From...' will add registration fees for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £150.00

New Registration      Open Participant      Find...

Link?	Event ID	Date	Participant	Status	Attended	Amount Applied	Con
<input type="checkbox"/>	Golf Tournament - 1...	31/07/1999	Nick Vaughn	Paid	<input checked="" type="checkbox"/>		Nick Va
<input type="checkbox"/>	CPR Training Session	07/08/2004	Nick Vaughn	Paid	<input type="checkbox"/>		Nick Va

Load Registrations From...

Applied to Membership: £0.00      Applied: £0.00      Remaining: £150.00

OK      Cancel

While in the gift record, if you ever need to view the batch number a gift was posted through, select **File, Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

Because you entered Nick Vaughn in the **Constituent Name** column of the Data Entry grid, any existing registrations for Nick automatically appear on the Pay Registration Fees screen.

- Click **Load Registrations From**. The Open screen appears so you can search for Jane Vaughn in your database. When you locate Jane, all Jane's participant information appears in the grid on the Pay Registration Fees screen.

**Pay Registration Fees**

Pay registration fees with this gift by selecting 'Link?' next to the registration fees you wish to pay. Selecting 'Load Registration From...' will add registration fees for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £150.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Amount Applied	Con...
<input type="checkbox"/>	Golf Tournament - 1...	31/07/1999	Nick Vaughn	Paid	<input checked="" type="checkbox"/>		Nick Ve
<input type="checkbox"/>	CPR Training Session	07/08/2004	Nick Vaughn	Paid	<input type="checkbox"/>		Nick Ve
<input checked="" type="checkbox"/>	CPR Training Session	07/08/2004	Jane Vincent	Paid	<input type="checkbox"/>		Jane V

Load Registrations From...

Applied to Membership: £0.00 Applied: £0.00 Remaining: £150.00

OK Cancel

- In the **Link?** column, check the checkbox in the rows containing Nick and Jane's CPR class information.
- In the **Amount Applied** column for Nick and Jane's registration, enter the amount £75.

**Pay Registration Fees**

Pay registration fees with this gift by selecting 'Link?' next to the registration fees you wish to pay. Selecting 'Load Registration From...' will add registration fees for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £150.00


New Registration Open Participant Find...

Link?	Event ID	Participant	Status	Attended	Amount Applied
<input type="checkbox"/>	Golf Tournament - 1999	Mr Nick Vaughn	Paid	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	CPR Training Session	Mr Nick Vaughn	Paid	<input type="checkbox"/>	£75.00
<input checked="" type="checkbox"/>	CPR Training Session	Miss Jane Vincent	Paid	<input type="checkbox"/>	£75.00

Load Registrations From...

Applied to Membership: £0.00 Applied: £150.00 Remaining: £0.00

OK Cancel

 Although you set up the link between Nick's gift and Jane and Nick's participant records for the CPR class, the link between the gift and participant records are actually created when you commit the batch to the database.


- Click **OK**. You return to the Batch Data Entry screen.
- To create a gift record in the database for Nick, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

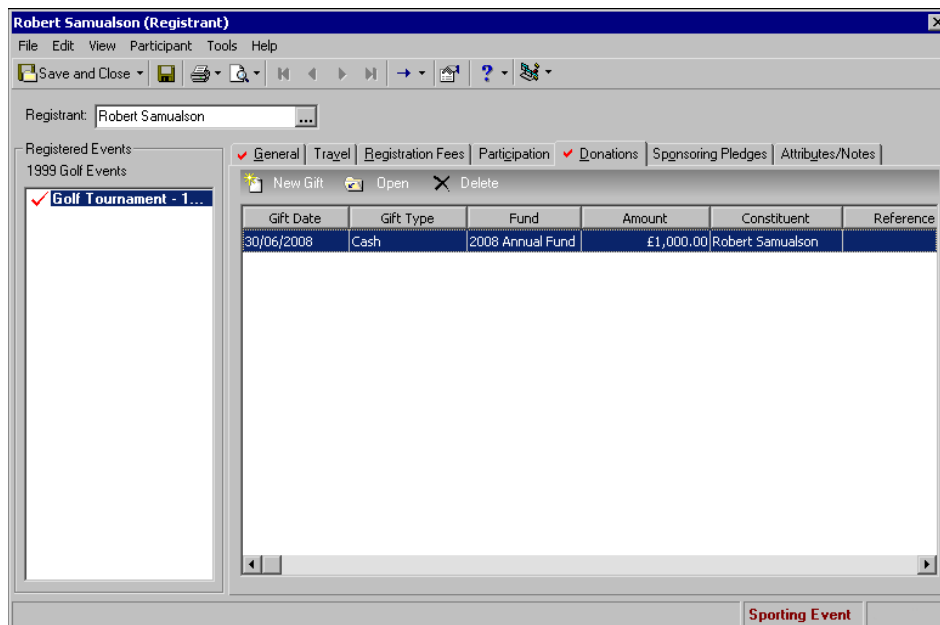
## Other Donations

Other donations are gifts made to an event, other than registration fees, by anyone in your database. For example, Robert Samuelson decides to donate £1,000 to your annual golf tournament. He is not participating in or attending your event. He just believes in your cause and wants to donate money. Because Robert's gift is associated with the event, you can link his other donation on the Donations tab of his participant record.

To give an other donation, the donor must be a constituent in your database. If a participant who is not a constituent makes an other donation to your event, you must add the participant as a constituent before you can link the gift and participant record. For more information about adding participants as constituents, see the *Event Management Data Entry Guide*.

After you link a gift to a participant record, the gift appears on the Donations tab of the participant record.

 Gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, and Other can be linked to a participant record as an other donation.



From the Donations tab, you can open linked gift records and break the link for gifts listed in the grid. Also, you can link the participant record to new or existing gifts in the database. For more information about this tab, see the *Event Management Data Entry Guide*.

## Linking a Gift to an Event as an Other Donation

After you create a gift record for an other donation, you need to link the gift record to the participant record of the individual or organisation you want to associate with this gift. Any constituent can give a donation on behalf of another participant. For example, a participant's relative may choose to give a donation on behalf of the relative participating in the event.

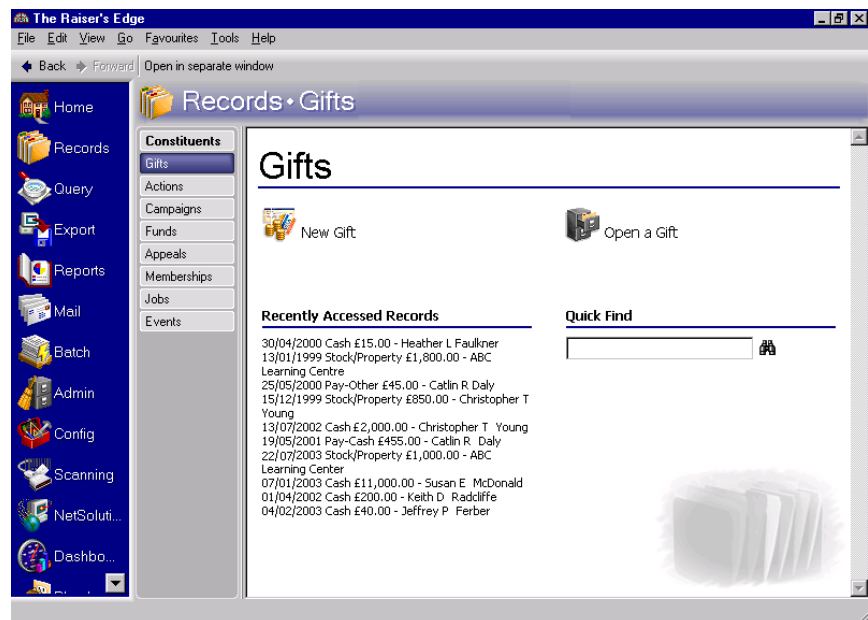
You can create a gift record for an other donation from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for an other donation to a participant record from the Gifts page and from a gift batch.

➤ **Linking a gift record to an event as an other donation from a gift record**




You invited Mark Adamson, one of your best volunteers, to attend your volunteer dinner. Mark's fees are complimentary, but he decides to donate an additional £100 to help fund the dinner. You already created a participant record for Mark. Now, you need to create a gift record for Mark's additional gift and link the gift record to his volunteer dinner participant record as an other donation.

1. On the Raiser's Edge bar, click **Records**.
2. Click the **Gifts** link. The Gifts page appears.



3. Click **New Gift**. The New Gift screen appears.

4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Mark Adamson in your database. When you locate and select Mark, his name appears in the **Constituent** field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

 Once you enter a name in the **Constituent** field, the program disables the field.

5. From the New Gift screen, add the information about Mark's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

6. To link the gift to Mark's existing participant record, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Other Donations**. The New Donation screen appears.

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...



7. In the **Link?** column, check the checkbox in the row containing Mark's volunteer dinner information. When you check this checkbox, the full amount of the gift is linked as an other donation to Mark's participant record for the volunteer dinner.

**New Donation**

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.


Gift amount: £100.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input checked="" type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...

Load Registrations From...

OK Cancel

 An other donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

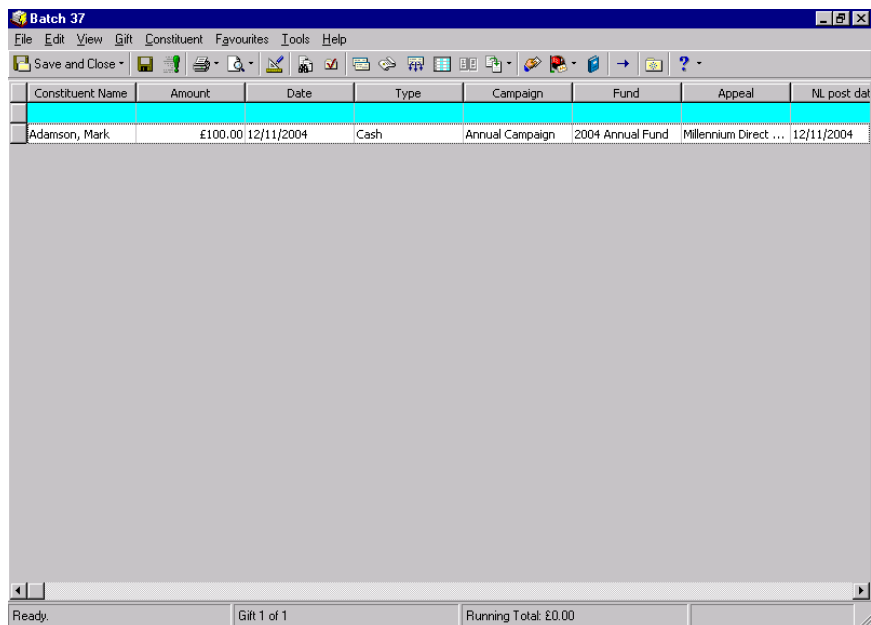
8. Click **OK**. You return to Mark's gift record.
9. Click **Save and Close** on the toolbar. Mark's gift record is added to the database and is now linked to his participant record for the volunteer dinner.

## ➤ Linking a gift record to an event as an other donation from a gift batch

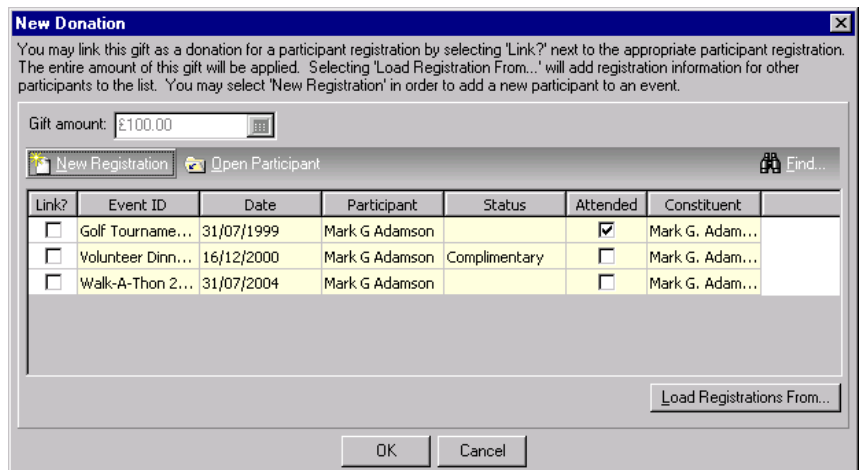


You invited Mark Adamson, one of your best volunteers, to attend a volunteer dinner you are hosting. After Mark pays his registration fees, he decides to donate an additional £100 to help fund the dinner. You already created a participant record for Mark. Now you need to create a gift record for Mark's additional gift and link the gift record to his volunteer dinner participant record as an other donation.

1. From a gift batch, add a gift of £100 for Mark Adamson as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.



2. With your cursor in the row of the batch containing Mark's gift, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Other Donations**. The New Donation screen appears.



- In the **Link?** column, check the checkbox in the row containing Mark's volunteer dinner information. When you check this checkbox, the full amount of the gift is linked as an other donation to Mark's participant record for the volunteer dinner.

**New Donation**

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.


Gift amount: £100.00

New Registration Open Participant Find...


Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input checked="" type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...

Load Registrations From...

OK Cancel

 An other donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

- Click **OK**. You return to the Batch Data Entry screen.
- To create a gift record in the database for Mark, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

 You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says “Please see the Supervisor before changing information to this gift record.” The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit, Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Check the **Display annotation automatically** checkbox and the message appears whenever the record opens.

## ➤ Linking a constituent’s gift to another person’s participant record as an other donation from a gift record



Paul Fredrick, the cousin of your volunteer Mark Adamson, is very pleased your organisation is honouring Mark at the volunteer dinner. To support his cousin’s interests, Paul decides to donate £50 to your organisation. Because this gift was donated on behalf of Mark, you can link the gift to Mark’s participant record for the volunteer dinner as an other donation.

1. On the Raiser’s Edge bar, click **Records**.
2. Click the **Gifts** link. The Gifts page appears.


The screenshot shows the 'The Raiser's Edge' application window. The main content area is titled 'Records • Gifts' and displays a list of 'Recently Accessed Records' with the following data:

Date	Type	Amount	Constituent Name
30/04/2000	Cash	£15.00	Heather L Faulkner
13/01/1999	Stock/Property	£1,800.00	ABC Learning Centre
25/05/2000	Pay-Other	£45.00	Catlin R Daly
15/12/1999	Stock/Property	£850.00	Christopher T Young
13/07/2002	Cash	£2,000.00	Christopher T. Young
19/05/2001	Pay-Cash	£455.00	Catlin R. Daly
22/07/2003	Stock/Property	£1,000.00	ABC Learning Center
07/01/2003	Cash	£11,000.00	Susan E. McDonald
01/04/2002	Cash	£200.00	Keith D. Radcliffe
04/02/2003	Cash	£40.00	Jeffrey P. Ferber


The interface also includes a 'Quick Find' search box and a 'New Gift' button. The left sidebar contains navigation options: Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSoluti..., and Dashbo... The top menu bar includes File, Edit, View, Go, Favourites, Tools, and Help.

3. Click **New Gift**. The New Gift screen appears.

4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Paul Fredrick in your database. When you find and select Paul, his name appears in the **Constituent** field. For more information about searching for a constituent in the database, see the Program Basics chapter of the *Program Basics Guide*.

 Once you enter a name in the **Constituent** field, the field is disabled.

- From the New Gift screen, add the information about Paul's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

 The grid on the New Donation screen does not contain any information if Paul does not have a participant record for any event.

- To link Paul's gift to Mark's existing participant record, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Other Donations**. The New Donation screen appears.

Link?	Event ID	Date	Participant	Status	Attended	Constituent

7. Click **Load Registrations From**. The Open screen appears so you can locate Mark Adamson in the database. When you locate Mark, all Mark's participant information appears in the grid on the New Donation screen.

**New Donation**

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00


New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...

Load Registrations From...

OK Cancel

8. In the **Link?** column, check the checkbox in the row containing Mark's volunteer dinner information. When you check this checkbox, the full amount of Paul's gift is linked as an other donation on Mark's participant record for the volunteer dinner.

 A donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament events.

**New Donation**

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input checked="" type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...

Load Registrations From...

OK Cancel

9. Click **OK**. You return to Paul's gift record.
10. Click **Save and Close** on the toolbar. Paul's gift record is added to your database and is now linked as an other donation to Mark's participant record for the volunteer dinner.

## ➤ Linking a constituent's gift to another person's participant record as an other donation from a gift batch



Paul Fredrick, the cousin of your volunteer Mark Adamson, is very pleased your organisation is honouring Mark at the volunteer dinner. To support his cousin's interests, Paul decides to donate £50 to your organisation. Because this gift was donated on behalf of Mark, you can link the gift to Mark's participant record for the volunteer dinner as an other donation.

1. From a gift batch, add a gift of £50 for Paul Fredrick as shown on the screen below. For more information about setting up a gift batch and entering a gift into a batch, see the *Batch Guide*.

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal	NL post dat
Fredrick, Paul	£50.00	04/12/2004	Cash	Annual Campaign	2004 Annual Fund	Millennium Direct ...	04/12/2004

Press F7 for search      Gift 1 of 1      Running Total: £0.00

The grid on the New Donation screen does not contain any information because Paul does not have a participant record for any event.

2. With your cursor in the row of the batch containing Paul's gift, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Other Donations**. The New Donation screen appears.

**New Donation**

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

Link?	Event ID	Date	Participant	Status	Attended	Constituent



3. Click **Load Registrations From**. The Open screen appears so you can search for Mark Adamson in your database. When you find and select Mark, all Mark's participant information appears in the grid on the New Donation screen.

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...


4. In the **Link?** column, check the checkbox in the row containing Mark's volunteer dinner information. When you check this checkbox, the full amount of Paul's gift is linked as an other donation on Mark's participant record for the volunteer dinner.


Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Golf Tourname...	31/07/1999	Mark G Adamson		<input checked="" type="checkbox"/>	Mark G. Adam...
<input checked="" type="checkbox"/>	Volunteer Dinn...	16/12/2000	Mark G Adamson	Complimentary	<input type="checkbox"/>	Mark G. Adam...
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Mark G Adamson		<input type="checkbox"/>	Mark G. Adam...


5. Click **OK**. You return to the Batch Data Entry screen.
6. To create a gift record in the database for Paul, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.


## Sponsoring Pledges

Sponsoring pledges are donations made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, your organisation is holding a walk-a-thon for breast cancer awareness. All proceeds from the walk-a-thon will be donated toward breast cancer research. To participate in the walk-a-thon, each participant must find as many people as possible to donate money for each mile

 A donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

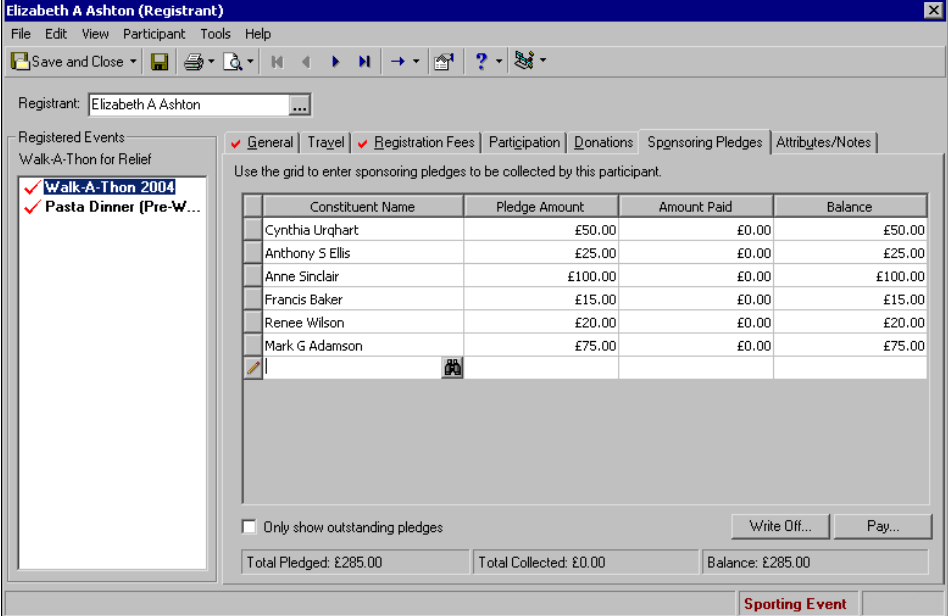
 Although you set up the link between Paul's gift and Mark's participant record, the link between the gift and participant record is actually created when you commit the batch to the database.

 Sponsoring pledges can be given only for participants of sporting events.

 You can also add new sponsoring pledges from the Sponsoring Pledges tab of a participant record. For more information, see the *Event Management Data Entry Guide*.

they walk. Elizabeth Ashton is participating in your walk-a-thon and asks many of her friends to pledge their financial support. Cynthia Urqhart agrees to donate £50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

When you link a gift record for a sponsoring pledge to a participant record, an entry is added to the Sponsoring Pledges tab on the participant record.



Elizabeth A Ashton (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Elizabeth A Ashton

Registered Events

Walk-A-Thon for Relief

- ✓ Walk-A-Thon 2004
- ✓ Pasta Dinner (Pre-W...

Use the grid to enter sponsoring pledges to be collected by this participant.

Constituent Name	Pledge Amount	Amount Paid	Balance
Cynthia Urqhart	£50.00	£0.00	£50.00
Anthony S Ellis	£25.00	£0.00	£25.00
Anne Sinclair	£100.00	£0.00	£100.00
Francis Baker	£15.00	£0.00	£15.00
Renee Wilson	£20.00	£0.00	£20.00
Mark G Adamson	£75.00	£0.00	£75.00

Only show outstanding pledges

Total Pledged: £285.00    Total Collected: £0.00    Balance: £285.00

Write Off...    Pay...

Sporting Event

## Adding a Sponsoring Pledge for an Existing Participant

To add a sponsoring pledge to a participant record, you need to create a pledge gift record to add pledge information, such as the campaign, fund, appeal, and package to which the gift is attributed. After you add a pledge gift record, you need to link the pledge to the participant record of the individual or organisation you want to associate with the gift.

Any constituent can give a sponsoring pledge for a participant. For example, a company may make a sponsoring pledge donation for each of its employees participating in an event. To give a sponsoring pledge, the donor of the pledge must be a constituent in your database. If the donor of the sponsoring pledge is not a constituent, you must add the donor as a constituent before you can link the gift and participant records. For more information about adding participants as constituents, see the *Event Management Data Entry Guide*.


You can create a gift record for a sponsoring pledge from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for a sponsoring pledge to an existing participant record from the Gifts tab of a constituent record and from a gift batch.

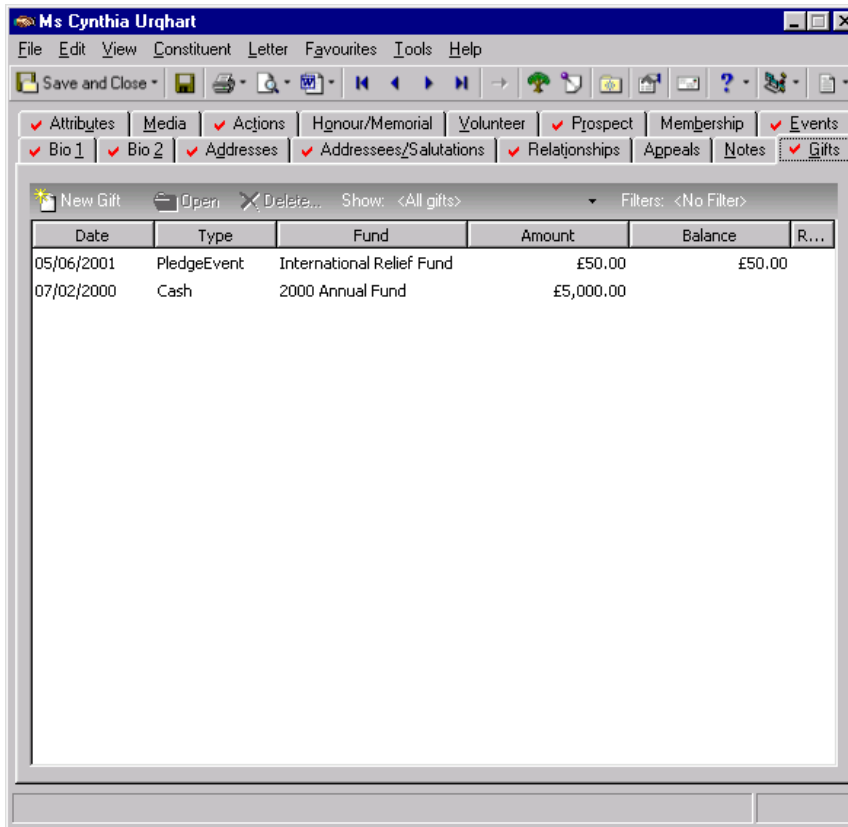
## ➤ Adding a sponsoring pledge from a gift record



Elizabeth Ashton is participating in your walk-a-thon and has asked many of her friends to pledge money for each mile she walks. Cynthia Urqhart agrees to donate £50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

1. From Cynthia Urqhart's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

 If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.



2. On the action bar, click **New Gift**. The New Gift screen appears.

To create a link between a participant record and a gift record for the sponsoring pledge, you must select "Pledge" in the **Gift type** field.

- From the New Gift screen, select the Gift tab and add the information about Cynthia's pledge as shown on the screen below. For more information about adding a gift record for a pledge, see the Pledges chapter of the *Gift Records Guide*.

- Select the Instalments/Payments tab.

Inst No.	Date	Gift Type	Amount	Balance	Constituent

Next Instalment Due: None    Received: £0.00    Balance: £0.00

- Click **Schedule**. The Pledge Instalment Schedule screen appears. Schedule Cynthia's pledge as shown on the screen below. For more information about scheduling pledges, see the Pledges chapter of the *Gift Records Guide*.

Use the 'Schedule' fields, then select 'Distribute' to help generate an instalment schedule.

Instalment Schedule

Gift Amount: £150.00

Frequency: **Single Instalment** No. Instalments: 1

Single Instalment

Date	Amount
15/07/2004	£150.00


Starting on: 15/07/2004

Instalments due on 15/07/2004

Distribute Reschedule

OK Cancel

- Click **OK**. You return to the Instalments/Payments tab.
- To link this gift record to Elizabeth's existing participant record, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

 Once "Pledge" is selected in the **Gift type** field on the gift record, the **Gift, Links, Events, Sponsoring Pledges** menu option is enabled.

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.


Gift amount: £50.00


New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart

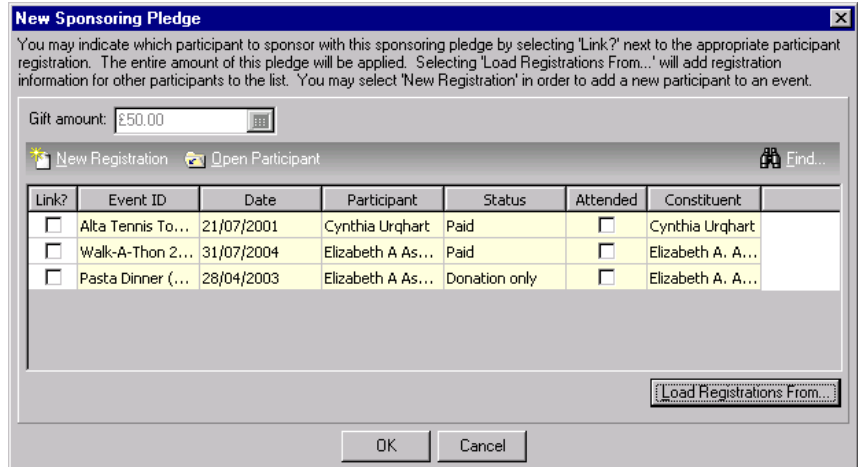
Load Registrations From...

OK Cancel

 The grid on the New Sponsoring Pledge screen does not contain any information because Cynthia does not have a participant record for any event.

 A donation can be linked to only one participant record. For example, you cannot link Cynthia's donation to more than one participant record.

- Click **Load Registration From**. The Open screen appears so you can search for Elizabeth Ashton in your database. When you find and select Elizabeth, her event information appears in the grid on the New Sponsoring Pledge screen.



**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

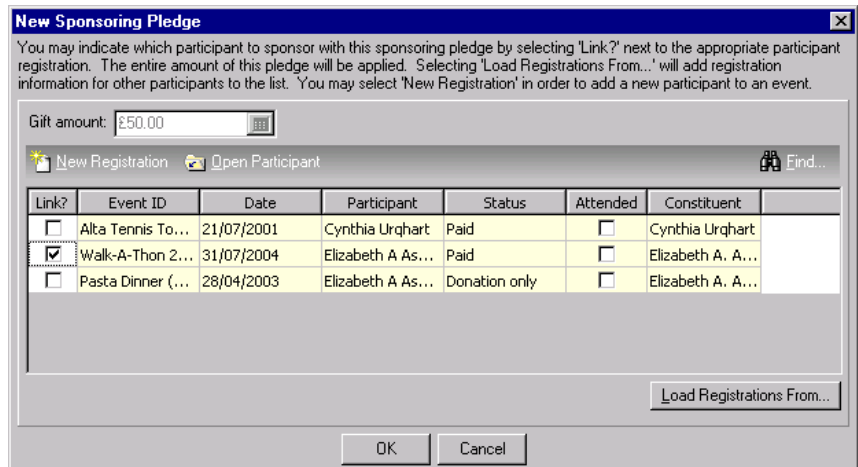
New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

- In the **Link?** column, check the checkbox in the row containing Elizabeth's walk-a-thon information.



**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input checked="" type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

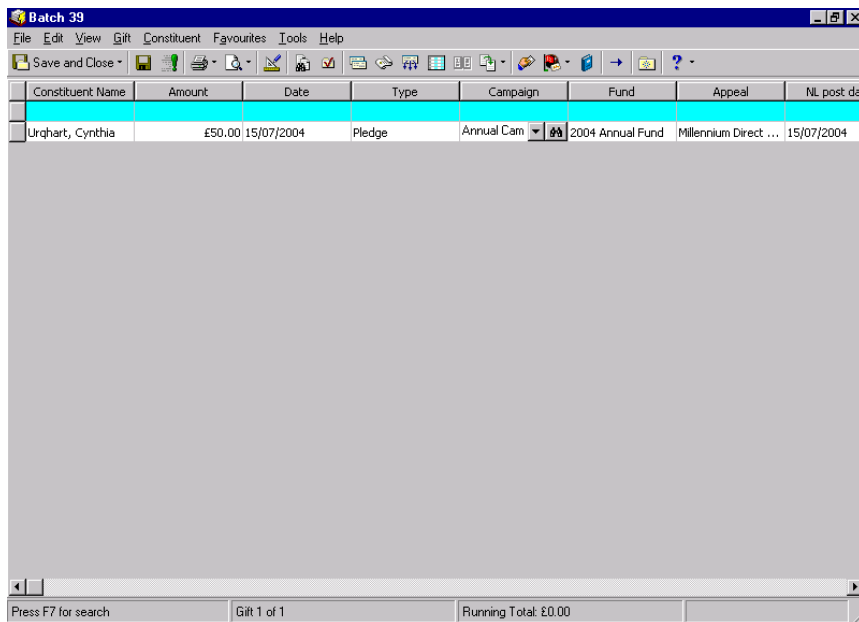
- Click **OK**. You return to Cynthia's gift record.
- On the toolbar of the gift record, click **Save and Close**. Cynthia's sponsoring pledge is now linked to Elizabeth's participant record for the walk-a-thon. You return to the Gifts tab of Cynthia's constituent record.
- Click **Save and Close**.

## ➤ Adding a sponsoring pledge from a gift batch



Elizabeth Ashton is participating in your walk-a-thon and has asked many of her friends to pledge money for each mile she walks. Cynthia Urqhart agrees to donate £50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

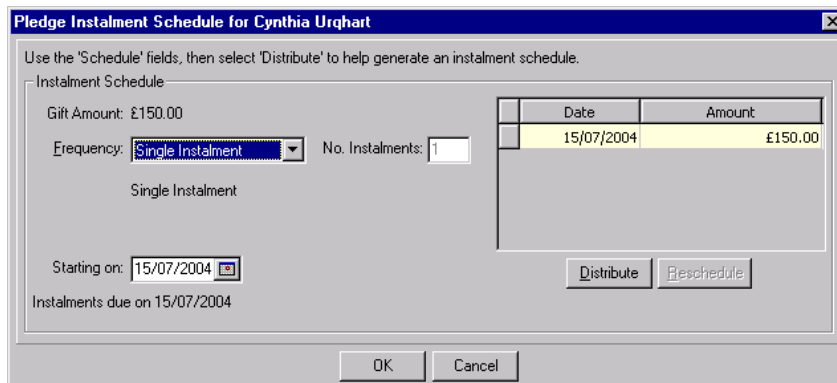
1. From a gift batch, add a gift of £50 for Cynthia Urqhart as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.




2. With your cursor in the row of the batch containing Cynthia's gift, select **Gift, Instalment Information** from the menu bar. The Pledge Instalment Schedule screen appears. Schedule Cynthia's pledge as shown on the screen below. For more information about scheduling pledges, see the Pledges chapter of the *Gift Records Guide*.



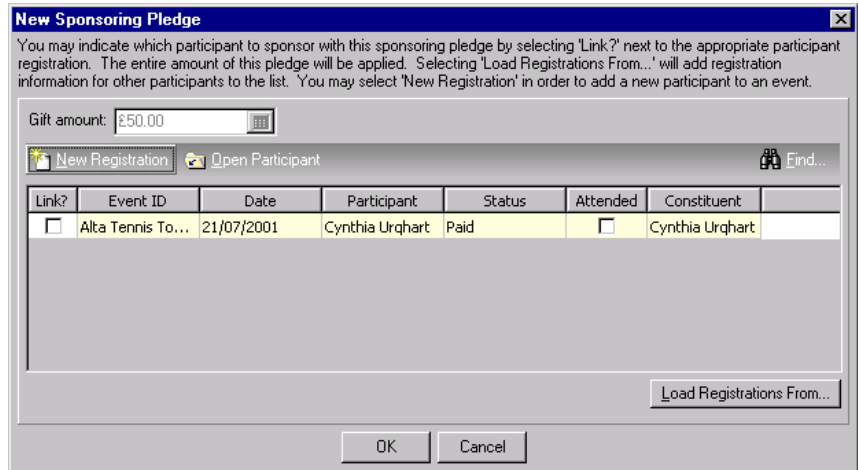
Once "Pledge" is selected in the **Gift type** field on the gift record, the **Gift, Instalment Information** menu option is enabled.



3. Click **OK**. You return to Data Entry screen.

 The grid on the New Sponsoring Pledge screen does not contain any information because Cynthia does not have a participant record for any event.

- With your cursor in the row of the batch containing Cynthia's gift, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Sponsoring Pledges**. The New Sponsoring Pledge screen appears.



**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

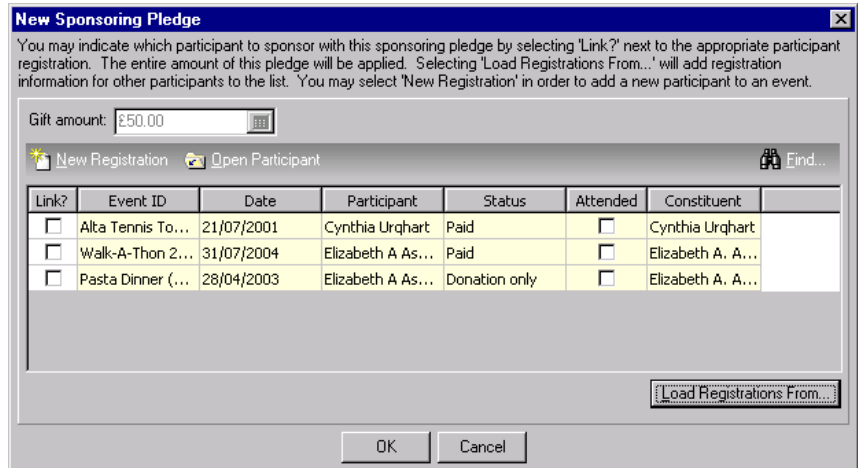
New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart

Load Registrations From...

OK Cancel

- Click **Load Registrations From**. The Open screen appears so you can search for Elizabeth Ashton in your database. When you find and select Elizabeth, her event information appears in the grid on the New Sponsoring Pledge screen.



**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A. As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A. As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel



6. In the **Link?** column, check the checkbox in the row containing Elizabeth's walk-a-thon information.

7. Click **OK** to return to the Batch Data Entry screen.  
8. Click **Save and Close**.


To create a gift record in the database for Cynthia, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.


## Paying an Existing Sponsoring Pledge

After you receive the actual gift for a sponsoring pledge, you need to create a gift record and apply it to the sponsoring pledge to reduce the balance. When you apply a payment toward a sponsoring pledge, the payment information updates on the Sponsoring Pledges tab of the participant record to which the pledge is linked.

This section explains three ways to pay an existing sponsoring pledge.

- You can pay a sponsoring pledge entered in the database by creating a new gift record from the Gifts page or the Gifts tab of the donor's constituent record. Then, you need to apply the gift record toward an existing sponsoring pledge in the database to reduce the balance of this pledge.
- You can pay a sponsoring pledge by adding a payment to a pledge currently entered in a gift batch. To use this method, the gift batch containing the sponsoring pledge must not yet be committed to the database.
- You can pay a sponsoring pledge by adding a gift record in a gift batch and applying the gift record toward an existing sponsoring pledge entered in the database to reduce the balance of the pledge.

 A donation can be linked to only one participant record. For example, you cannot link Cynthia's pledge to more than one participant record.

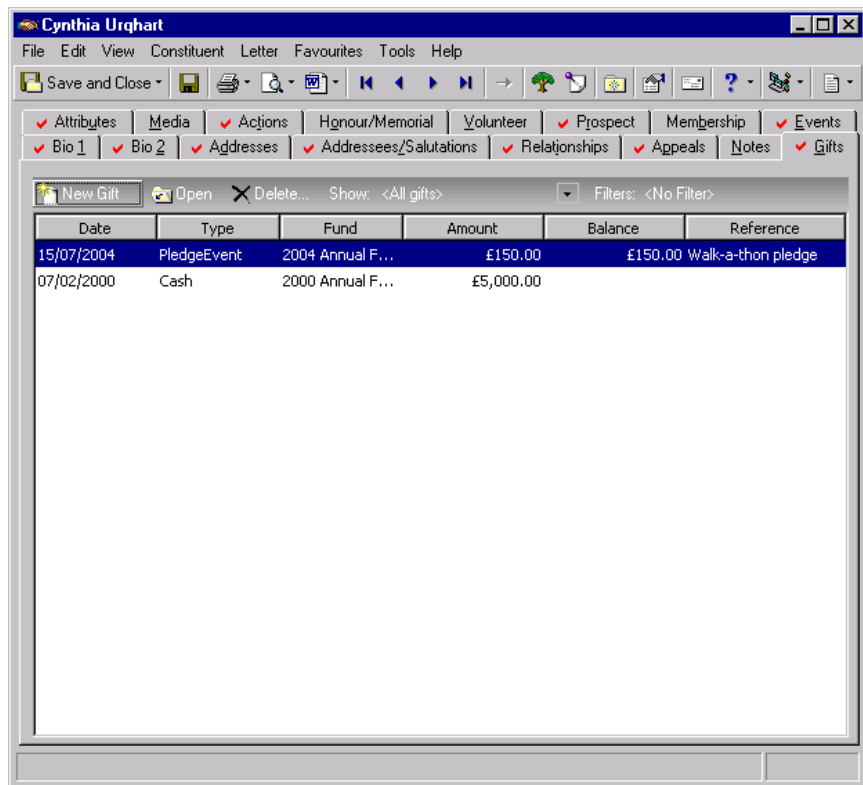
 Although you set up the link between Cynthia's gift and Elizabeth's participant record, the link between the gift and participant record is actually created when you commit the batch to the database.


### ➤ Paying an existing sponsoring pledge from a gift record



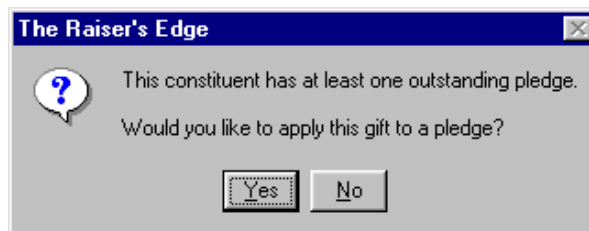
On 15/07/2004, you receive a cheque for £50 from Cynthia Urqhart to pay her sponsoring pledge for Elizabeth Ashton. To pay Cynthia's pledge, you need to create a gift record and apply it to Cynthia's pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift record" on page 29.

1. From Cynthia Urqhart's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



 If you do not receive a message, select **Gift, Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

2. On the action bar, click **New Gift**. The program displays a message.



- Click **Yes** to apply Cynthia's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.

Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance	Amount Applied	Con
<input checked="" type="checkbox"/>	15/07/2...	Pledge	2004 An...	Walk-a-th...	£150.00	£150.00	£150.00	Cynthia U

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, £50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's £50 pledge.

- Click **OK**. You return to the Gift tab of Cynthia's gift record. The program defaults information from the pledge record to this gift record for the pledge instalment.

- In the **Gift date** field, enter the date 15/07/2004.

6. In the **Pay method** field, select “Personal Cheque”. When you select Personal Cheque, the **Cheque no./date** fields appear to the right of the **Pay method** field.
7. In the **Cheque no./date** fields, enter the cheque number “1597” and the date 15/07/2004.

The screenshot shows a software window titled "New Gift for Cynthia Urghart". The window has a menu bar with "File", "Edit", "View", "Gift", "Favourites", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Find", and navigation arrows. The main area has tabs for "Gift", "Miscellaneous", "Soft Credit", "Matching Gifts", "Tribute", "Attributes", "Tag", and "Split Gift". The "Gift" tab is active. The form fields are: Constituent: Urghart, Cynthia; ID: 83; Gift type: Cash; Reference: Walk-a-thon pledge; Gift subtype: (empty); Acknowledge: Not Acknowledged; Gift date: 15/07/2004; Amount: £50.00; Campaign: Annual Campaign; Fund: 2004 Annual Fund; Appeal: Walk-A-Thon; Package: (empty); Carvassers: Vaughn, Nick; Pay method: Personal Cheque; Cheque no./date: 1597 / 15/07/2004; Receipt: Not Received; Receipt amt/no.: £50.00. There are also buttons for Letter, ment Thank You, Benefits, and EFT?.

8. Click **Save and Close** on the toolbar. You return to the Gifts tab of Cynthia’s constituent record. Cynthia’s pledge payment is automatically added to the Sponsoring Pledges tab of her participant record.
9. Click **Save and Close**.

### ➤ Paying a sponsoring pledge for a pledge entered in a gift batch

You can use this procedure to add a payment to a pledge currently entered in a gift batch not yet committed to the database. If the pledge for which you want to add a payment already has a gift record in the database, see “Paying an existing sponsoring pledge from a gift record” on page 36.




On 15/07/2004, you receive a cheque for £50 from Cynthia Urqhart to pay her sponsoring pledge for Elizabeth Ashton. To pay Cynthia’s pledge, you need to create a gift record and apply it to Cynthia’s pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in “Adding a sponsoring pledge from a gift batch” on page 33.

1. Open the gift batch containing Cynthia Urqhart’s pledge. For more information about opening a gift batch, see the *Batch Guide*.

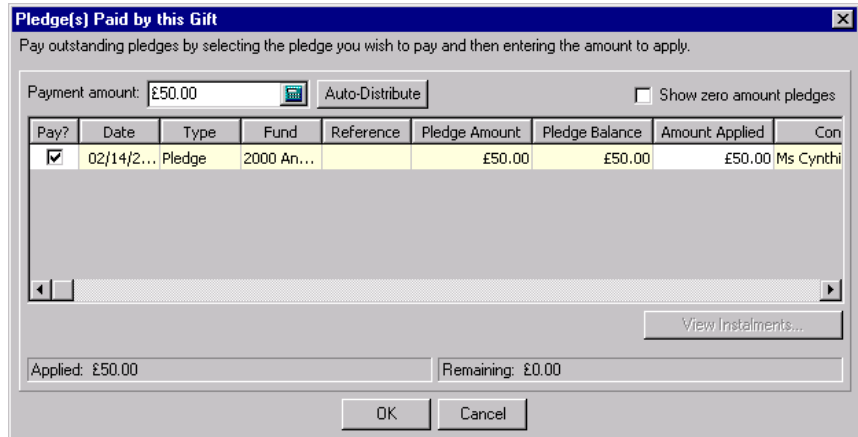
The screenshot shows a software window titled "Batch 40" with a menu bar (File, Edit, View, Gift, Constituent, Favourites, Tools, Help) and a toolbar. Below the toolbar is a table with the following data:

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal	NL post dat
Urqhart, Cynthia	£50.00	15/07/2004	Pledge	Annual Campaign	2004 Annual Fund	Walk-A-Thon	15/07/2004

At the bottom of the window, there is a status bar with the following text: "Press F3 for today's date, F7 for calendar", "Gift 1 of 1", and "Running Total: £0.00".

 If the **Gift type** of the row selected in the Data Entry grid is not Pledge, the **Add payment to pledge** option is disabled.

2. With your cursor in the row of the batch containing Cynthia's pledge gift, select **Gift, Add payment to pledge** from the menu bar. The Pledge(s) Paid by this Gift screen appears.



Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance	Amount Applied	Con
<input checked="" type="checkbox"/>	02/14/2...	Pledge	2000 An...		£50.00	£50.00	£50.00	Ms Cynthi

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, £50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's £50 pledge.

3. Click **OK**. You return to the Batch Data Entry screen. A separate row is not added for the pledge payment.
4. To create gift records for Cynthia's pledge and pledge payment, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.


## ➤ Paying an existing sponsoring pledge from a gift batch

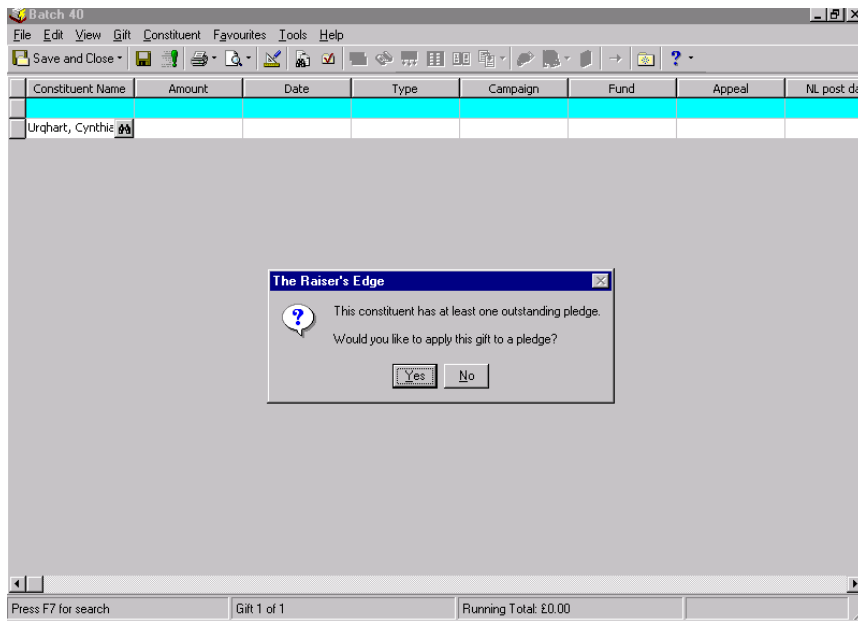
You can use this procedure to apply a pledge payment to a pledge already entered in the database. If the pledge for which you want to apply a payment is entered in a gift batch that is not yet committed to the database, see “Paying a sponsoring pledge for a pledge entered in a gift batch” on page 39.



On 15/07/2004, you receive a cheque for £50 from Cynthia Urqhart to pay her sponsoring pledge for Elizabeth. To pay Cynthia’s pledge, you need to create a gift record and apply it to Cynthia’s pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in “Adding a sponsoring pledge from a gift batch” on page 33.

1. From a gift batch, enter “Cynthia Urqhart” in the **Constituent Name** column. For more information about opening a gift batch, see the *Batch Guide*. After you enter Cynthia’s name in the **Constituent Name** column, a message appears.

 If you do not receive a message, select **Gift, Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.



- Click **Yes** to apply Cynthia's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.

Apply Gift to Pledge(s)

Pay outstanding pledges by selecting the pledge you wish to pay and then entering the amount to apply.

Payment amount: £ 50.00 Auto-Distribute  Show zero amount pledges

Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance	Amount Applied	Con
<input checked="" type="checkbox"/>	15/07/2...	Pledge	2004 An...	Walk-a-th...	£150.00	£150.00	£150.00	Cynthia U

View Instalments... Load Pledge(s) From...

Applied: £150.00 Remaining: £0.00

OK Cancel

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, £50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's £50 pledge.

- Click **OK**. You return to the Data Entry screen. The program defaults information from the pledge record to the row in the Data Entry grid for Cynthia's pledge payment.

Batch 40

File Edit View Gift Constituent Favourites Tools Help

Save and Close

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal	NL post dat
Urqhart, Cynthia	£50.00	15/07/2004	Cash	Annual Campaign	2004 Annual Fund	Walk-A-Thon	15/07/2004


Press F3 for today's date, F7 for calendar Gift 1 of 1 Running Total: £0.00



4. Add any additional information, including the payment method and posting status, to Cynthia's row in the gift batch.
5. To create a gift record in the database for Cynthia, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

## Breaking the Link between a Gift and an Event

On occasion, you may need to remove the link between a gift and participant record. For example, a constituent's pledge may have been designated as a sponsoring pledge in error. Also, the sponsoring pledge or donation could be linked to the wrong participant. When you break the link between a gift and participant record, the pledge gift record is not deleted from the database. This section explains how to break the link between a gift record and a participant record from a gift record and a gift batch.

 Although you applied payment to her existing pledge, the link between the gift records is actually created when you commit the batch to the database.

### ➤ Breaking a link between a gift and participant record from a gift record

Although this procedure explains how to break the link between a sponsoring pledge and a participant record, you can use the same steps to break a link for registration fees and other donations.



Elizabeth Ashton phones to inform you she cannot participate in the walk-a-thon. She had to go out of town unexpectedly. However, Cynthia Urqhart has made a sponsoring pledge for Elizabeth. You phone Cynthia and ask if she still wants to make a contribution to your organisation even though Elizabeth is unable to participate in the walk-a-thon. Cynthia agrees to make her pledge as promised. Because Elizabeth is no longer participating in the walk-a-thon, you need to break the link between Cynthia's sponsoring pledge and Elizabeth's participant record. To break the link between a sponsoring pledge and a participant record, you must first add a sponsoring pledge. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift record" on page 29.

1. Open the gift record for Cynthia Urqhart's £50 pledge. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.

The screenshot shows a software window titled "Gift for Cynthia Urqhart". The window contains a menu bar (File, Edit, View, Gift, Favourites, Tools, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with the "Gift" tab selected. The form displays the following information:

- Constituent: Urqhart, Cynthia ID: 83
- Gift type: Pledge (with a "Continuous" checkbox that is unchecked)
- Gift subtype: (empty dropdown)
- Pledged on: 15/07/2004
- Pledge amt: £50.00 (with a "Schedule" button)
- Campaign: Annual Campaign
- Fund: 2004 Annual Fund
- Appeal: Walk-A-Thon
- Package: (empty dropdown)
- Carvassers: Vaughn, Nick
- Pay method: Cash (with an "EFT?" checkbox that is unchecked)
- Ref no./date: (empty fields)
- Reference: Walk-a-thon pledge
- Acknowledge: Not Acknowledged (with a "Letter" button and a "pledge Thank You" dropdown)
- Receipt: Not Received (with a "Receipt" button)
- Receipt amt/no.: £50.00
- Send reminders: (checked checkbox)
- Status/date: Active 15/07/2004 (with a "History" button)
- Amount notes: £0.00
- Amount coins: £0.00
- Date added: (empty field)
- Balance: £0.00

- To break the link between Cynthia's gift record and Elizabeth's participant record, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input checked="" type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

- In the **Link?** column, uncheck the checkbox in the row containing Elizabeth's walk-a-thon information.

**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00


New Registration Open Participant Find...


Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

- Click **OK**. You return to Cynthia's gift record.
- Click **Save and Close** on the toolbar. Cynthia's gift record is no longer linked to Elizabeth's participant record for the walk-a-thon.

 If the **Sponsoring Pledges** menu option is disabled, verify "Pledge" is selected in the **Gift type** field on Cynthia's gift record.

 Even though you broke the link between Cynthia's sponsoring pledge and Elizabeth's participant record, Cynthia's gift record is not deleted from the database. For more information about deleting a gift, see the Gift Record chapter of the *Gift Records Guide*.

### ➤ Breaking a link between a gift and participant record from a gift batch

Although this procedure explains how to break the link between a sponsoring pledge and a participant record, you can use the same steps to break a link for registration fees and other donations. If you already committed the gift batch containing the gift for which you want to break the link, you need to open the gift record to break the link between the gift record and participant record. For more information, see “Breaking a link between a gift and participant record from a gift record” on page 44.



Elizabeth Ashton phones to inform you she cannot participate in the walk-a-thon. She had to go out of town unexpectedly. However, Cynthia Urqhart has made a sponsoring pledge for Elizabeth. You phone Cynthia and ask if she still wants to make a contribution to your organisation even though Elizabeth is unable to participate in the walk-a-thon. Cynthia agrees to make her pledge as promised. Because Elizabeth is no longer participating in the walk-a-thon, you need to break the link between Cynthia’s sponsoring pledge and Elizabeth’s participant record. To break the link between a sponsoring pledge and a participant record, you must first add a sponsoring pledge. This scenario uses the sponsoring pledge you set up in “Adding a sponsoring pledge from a gift batch” on page 33.

1. Open the gift batch for Cynthia Urqhart’s £50 pledge. For more information about opening a gift batch, see the *Batch Guide*.

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal	NL post date
Urqhart, Cynthia	£50.00	15/07/2004	Pledge	Annual Cam	2004 Annual Fund	Millennium Direct ...	15/07/2004

Press F7 for search      Gift 1 of 1      Running Total: £0.00

- With your cursor in the row of the batch containing Cynthia's gift, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.


Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input checked="" type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

 If the **Sponsoring Pledges** menu option is disabled, verify "Pledge" is selected in the **Gift type** field for Cynthia's gift.

- In the **Link?** column, uncheck the checkbox in the row containing Elizabeth's walk-a-thon information.

**New Sponsoring Pledge**

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: £50.00

New Registration Open Participant Find...

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Alta Tennis To...	21/07/2001	Cynthia Urqhart	Paid	<input type="checkbox"/>	Cynthia Urqhart
<input type="checkbox"/>	Walk-A-Thon 2...	31/07/2004	Elizabeth A As...	Paid	<input type="checkbox"/>	Elizabeth A. A...
<input type="checkbox"/>	Pasta Dinner (...)	28/04/2003	Elizabeth A As...	Donation only	<input type="checkbox"/>	Elizabeth A. A...

Load Registrations From...

OK Cancel

- Click **OK**. You return to the Batch Data Entry screen.
- Click **Save and Close** on the toolbar. Cynthia's gift record is no longer linked to Elizabeth's participant record for the walk-a-thon.

For more information about gift batches, see the *Batch Guide*.



# Index

## A

- accessing, *see* navigating
- adding a sponsoring pledge for an existing participant
  - defined 28
  - from a gift batch 33
  - from a gift record 29

## B

- batch
  - adding a sponsoring pledge for an existing participant 28
  - breaking the link between a gift and an event 43
  - linking a constituent's gift to another person's participant record as an other donation 26
  - linking a gift record to an event as an other donation 20
  - linking a gift to pay existing registration fees 13
  - paying an existing sponsoring pledge 35
- breaking a link between a gift and an event
  - defined 43
  - from a gift batch 46
  - from a gift record 44
- business rules 5

## C

- changing, *see* breaking the link between a gift and an event
- constituent
  - linking a gift to another person's participant record as an other donation
    - from a gift batch 26
    - from a gift record 22
- creating, *see* adding

## D

- donations, other 3, 15

## E

- editing, *see* breaking the link between a gift and an event
- event gifts, defined 7

## F

- fees, registration 8

## G

- gift record
  - adding a sponsoring pledge for an existing participant 29
  - breaking the link between a gift and an event 43
  - linking a constituent's gift to another person's participant record as an other donation 22
  - linking a gift record to an event as an other donation 16
  - linking a gift to pay existing registration fees 9
  - paying an existing sponsoring pledge 36
- guest, defined 2

## L

- linking a constituent's gift to another person's participant record as an other donation
  - from a gift batch 26
  - from a gift record 22
- linking a gift record to an event as an other donation
  - from a gift batch 20
  - from a gift record 16
- linking a gift to pay existing registration fees
  - from a gift batch 13
  - from a gift record 9

## M

- modifying, *see* breaking the link between a gift and an event

## N

- navigating 3
  - opening a gift record 4
  - toolbar 4

## O

- opening, *see* navigating
- other donations
  - defined 3, 15
  - linking a constituent's gift to another person's participant record as an other donation
    - from a gift batch 26
    - from a gift record 22
  - linking a gift record to an event as an other donation

from a gift batch 20  
from a gift record 16

## P

participant, defined 2  
paying an existing sponsoring pledge  
  defined 35  
  for a pledge entered in a gift batch 39  
  from a gift batch 41  
  from a gift record 36  
pledge, sponsoring 27

## R

registrant, defined 2  
registration fees  
  defined 8  
  linking a gift to pay existing fees from a gift batch  
    13  
  linking a gift to pay existing fees from a gift  
    record 9

## S

sponsor, defined 2  
sponsoring pledges  
  adding a sponsoring pledge for an existing  
    participant 28  
    from a gift batch 33  
    from a gift record 29  
  defined 3, 27  
  paying an existing sponsoring pledge  
    defined 35  
    for a pledge entered in a gift batch 39  
    from a gift batch 41  
    from a gift record 36

## T

toolbar 4