

# Donation Processing Procedures



**IRAQ AND AFGHANISTAN  
VETERANS OF AMERICA**

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## **TABLE OF CONTENTS**

Introduction  
The Process Step by Step  
What is Salesforce?  
Review And Prepare Your Media For Entry  
Creating A New Contact  
Entering A New Donation  
Running Reports  
The Weekly Donor Report  
Thank you Notes & Mail Merge  
Click & Pledge: The Virtual Terminal

## INTRODUCTION

The processing of donations is the cornerstone of stewardship for the organization. It is the basic data that informs the status of fundraising within the organization. If you are responsible for donation processing you are a steward for the organization.

We understand stewardship to be the following:

**stew-ard-ship** [stoo-erd-ship, styoo-] *noun*

1. the position and duties of a steward, a person who acts as the surrogate of another or others, especially by managing property, financial affairs, an estate, etc.

2. the responsible overseeing and protection of something considered worth caring for and preserving: *New regulatory changes will result in better stewardship of lands that are crucial for open space and wildlife habitat.*

3 the office, duties, and obligations of a steward

2 the conducting, supervising, or managing of something; *especially* : the careful and responsible management of something entrusted to one's care <*stewardship of natural resources*

You are one of the stewards along with the administrator of the organization's database and accuracy is paramount. A clean database is like money in the bank. Good Luck.

## THE PROCESS STEP BY STEP

1. Gather checks and payment media.
2. Review, classify and prepare media for entry
3. Enter all donations
4. Run a donation report in Salesforce
5. Run a Thank you note report in Salesforce
6. Import data into WORD and perform a mail merge
7. Print and mail Thank you letters.



## WHAT IS SALESFORCE?

Salesforce CRM is an online web-based Customer Relationship Management (CRM) service from Salesforce.com. As with all CRM software, it captures and organizes communications and information from current or prospective customers from many departments across a company or organization

Salesforce is a proven system to help manage large volumes of information across an organization and improves communication between departments for exceptional customer service.

## REVIEW AND PREPARE YOUR MEDIA FOR ENTRY

Determine whether the donation is one of the following:

- Cash
- Check
- Money Order (same as cash)
- Wire Transfer
- Credit Card (one time charge)

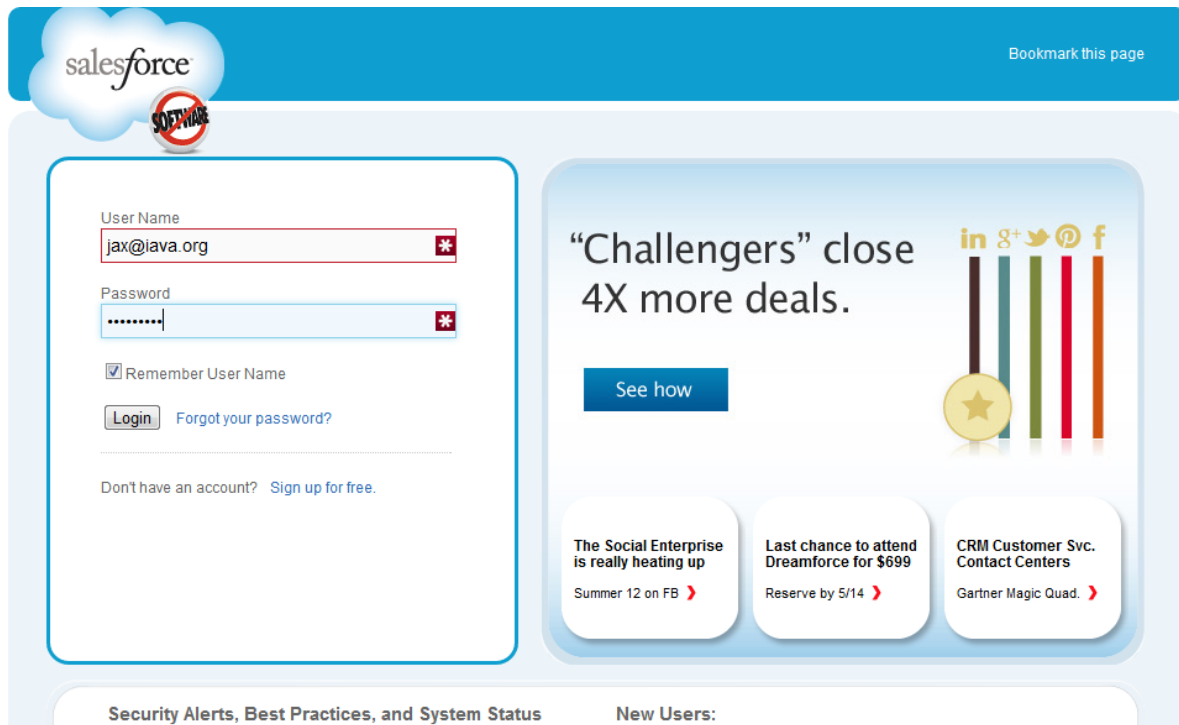
Determine whether the donation is one of the following:

- Individual
- Corporate
- Foundation
- Special Event Corporate
- Special Event Individual

# Donation Processing Procedures | 2012

Determine the close date of the donation. (The close date is the date of deposit)

Open your browser and navigate to the Salesforce login page and enter your username and password and log into the database.

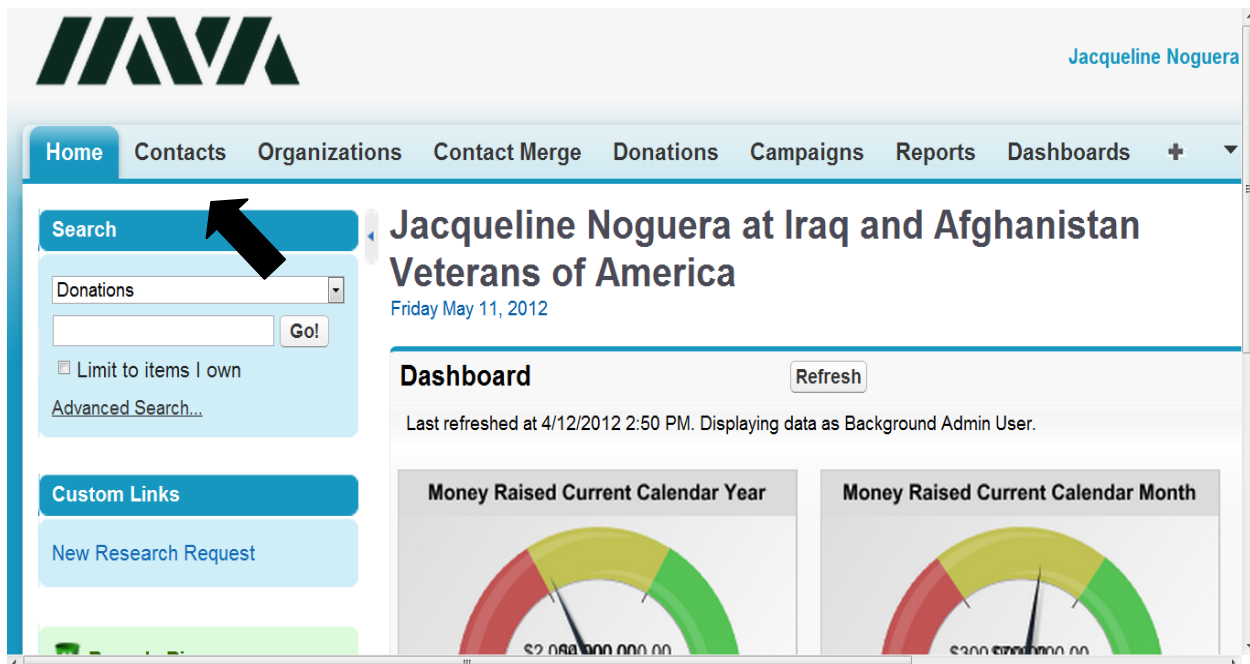


The image shows the Salesforce login page. At the top, there is a blue header with the Salesforce logo and a "Bookmark this page" link. Below the header, there is a login form on the left and a promotional banner on the right. The login form includes fields for "User Name" (containing "jax@java.org") and "Password" (masked with dots). There is a "Remember User Name" checkbox and a "Login" button. Below the login button, there is a link for "Forgot your password?" and a link for "Don't have an account? Sign up for free." The promotional banner on the right features the text "Challengers" close 4X more deals." and a "See how" button. Below the banner, there are three cards: "The Social Enterprise is really heating up Summer 12 on FB", "Last chance to attend Dreamforce for \$699 Reserve by 5/14", and "CRM Customer Svc. Contact Centers Gartner Magic Quad." At the bottom, there are links for "Security Alerts, Best Practices, and System Status" and "New Users:".

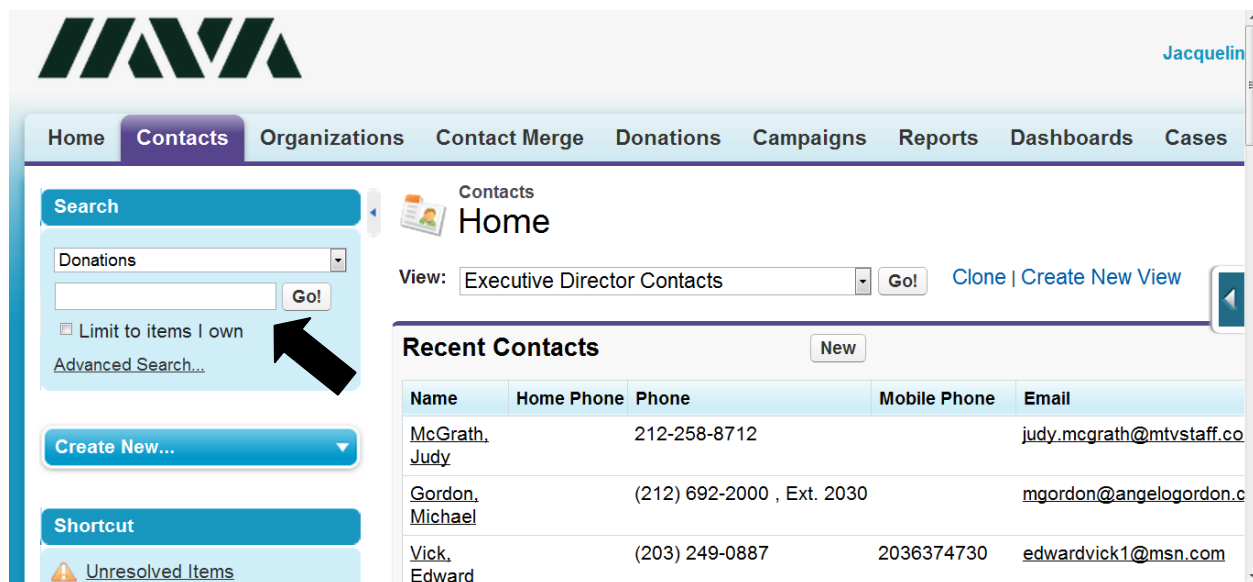
The opening home page should look like this.



Check if the contact/donor is already in the Salesforce database before proceeding. Select the **CONTACTS** tab to begin your search.



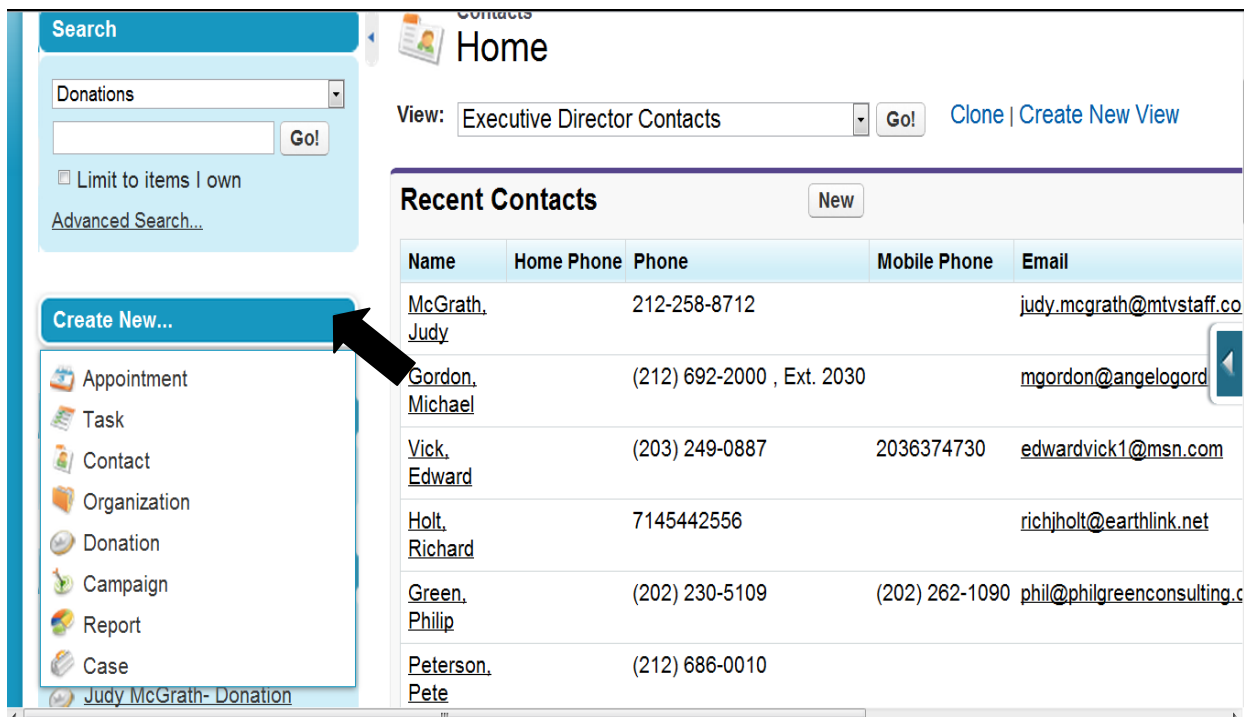
Enter the contact/donor name in the search box and press **GO** to begin the search.



If your search does not produce a result try entering the entire name or organization. Searches can be case sensitive.

## CREATING A NEW CONTACT

If you determine that the donor or organization is **NOT** in the database then enter the new contact, Begin by navigating over the **CREATE NEW** and engaging the drop down menu.



From this menu you can create the following:

- Appointment
- Task
- Contact
- Organization
- Donation
- Campaign
- Report
- Case

To create a contact choose **CONTACT** from the drop down menu,

**Search**

Donations

☐ Limit to items I own

[Advanced Search...](#)

**Create New...**

- Appointment
- Task
- Contact**
- Organization
- Donation
- Campaign
- Report
- Case

**Home**

View:   [Clone](#) | [Create New View](#)

**Recent Contacts**

Name	Home Phone	Phone	Mobile Phone	Email
McGrath, Judy		212-258-8712		judy.mcgrath@mtvstaff.co
Gordon, Michael		(212) 692-2000 , Ext. 2030		mgordon@angelogord
Vick, Edward		(203) 249-0887	2036374730	edwardvick1@msn.com
Holt, Richard		7145442556		richjholt@earthlink.net
Green, Philip		(202) 230-5109	(202) 262-1090	phil@philgreenconsulting.c
Peterson, Pete		(212) 686-0010		

Once you have chosen **CONTACT**, you will be taken to the screen below.

**IAVA CRM**

Jacqueline Noguera ▾ [Help & Training](#)

**Home** **Contacts** Organizations Contact Merge Donations Campaigns Reports Dashboards Cases

**Search**

Donations

☐ Limit to items I own

[Advanced Search...](#)

**Create New...**

- Appointment
- Task
- Contact**
- Organization
- Donation
- Campaign
- Report
- Case

**Shortcut**

[Unresolved Items](#)

**New Contact** [Help for this Page](#)

## Select Contact Record Type

Select a record type for the new contact. To skip this page in the future, change your record type settings on your personal setup page.

**Select Contact Record Type**

Record Type of new record

To continue to enter a contact, choose the default and press **CONTINUE**.

Once you have chosen **CONTINUE** you will be taken to the screen CONTACTS screen.



This is the entire layout of the **CONTACT** page. The primary information that must be entered is broken out into sections: **Contact Detail**, **Donor Information**, **Contact Information** and **Address Information**

The screenshot displays the full CONTACT page layout. It features a sidebar on the left with navigation links. The main content area is divided into several sections, each with a label in a white box: **Contact Detail**, **Donor Info**, **Contact Info**, and **Address Info**. These sections contain various input fields for text, dates, and checkboxes. A legend at the bottom right indicates that a red vertical bar next to a field name signifies 'Required Information'.

Begin with the **CONTACT DETAIL**. If you are missing information you can always go back and edit the entry at any time.

This screenshot shows the 'New Contact' form within the CONTACT page. The form is titled 'Contact Edit' and 'New Contact'. It includes a navigation bar at the top with links to Organizations, Contact Merge, Donations, Campaigns, Reports, Dashboards, and Cases. The form itself is divided into sections: **Contact Details**, **Donor Information**, **Contact Information**, and **Address Information**. Each section contains input fields for various data points. A legend at the bottom right indicates that a red vertical bar next to a field name signifies 'Required Information'.

**Search**  
Donations  
Limit to items I own  
Advanced Search

**Create New...**

**Shortcut**  
Unresolved Items

**Recent Items**  
Judy McGrath- Donation 12/14/2010  
Judy McGrath- Donation 12/14/2010  
Judy McGrath  
Judy McGrath  
Michael Gordon  
Michael Gordon

**Contact Edit**  
Save Save & New Cancel

**Contact Details** ! = Required Information

First Name --None--  
Last Name  
Title  
Company  
Deceased ☐

Referred By  
Source --None--  
General Notes  
Tag  
Email  
Phone

**Donor Information**  
Donor Notes



Don't forget to save the entry when you finish.

**Donor Information**  
Donor Notes

**VIP and Board**  
VIP ☐  
VIP Detail  
Available  
Event Host Committee  
Event Sponsor  
Donor Prospect  
Chosen  
IAVA Board Member ☐  
Board Memberships

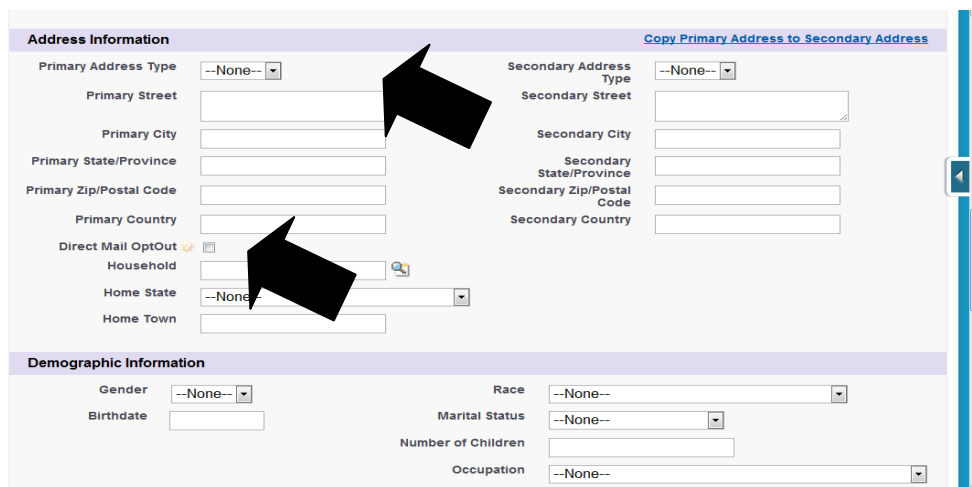
**Contact Information**  
Preferred Phone --None--  
Mobile Phone  
Work Phone  
Other Phone  
Fax  
Preferred Email --None--  
Personal Email  
Work Email  
Alternate Email  
Email Opt Out ☐  
Should Not Receive Online Blasts ☐  
Email Status --None--

**Address Information** [Copy Primary Address to Secondary Address](#)

**DONOR INFORMATION:** Additional information that does not correlate with the options provided can be entered into the **DONOR INFORMATION** section. Additional information about relationships, donor preferences like do not contact can also be entered here. Short biographical information can also be entered here but if a proper biography is available it should also be uploaded as a pdf into the notes and attachments section below.

**VIP AND BOARD:** VIP and board information can be entered here.

**CONTACT INFORMATION/ EMAIL OPT OUT:** If you are aware that the contact should not receive email of the options provided, check the boxes as appropriate. Enter **ADDRESS INFORMATION** in the area below. If the contact has requested not to be contact by mail check the **DIRECT MAIL OPT OUT** box



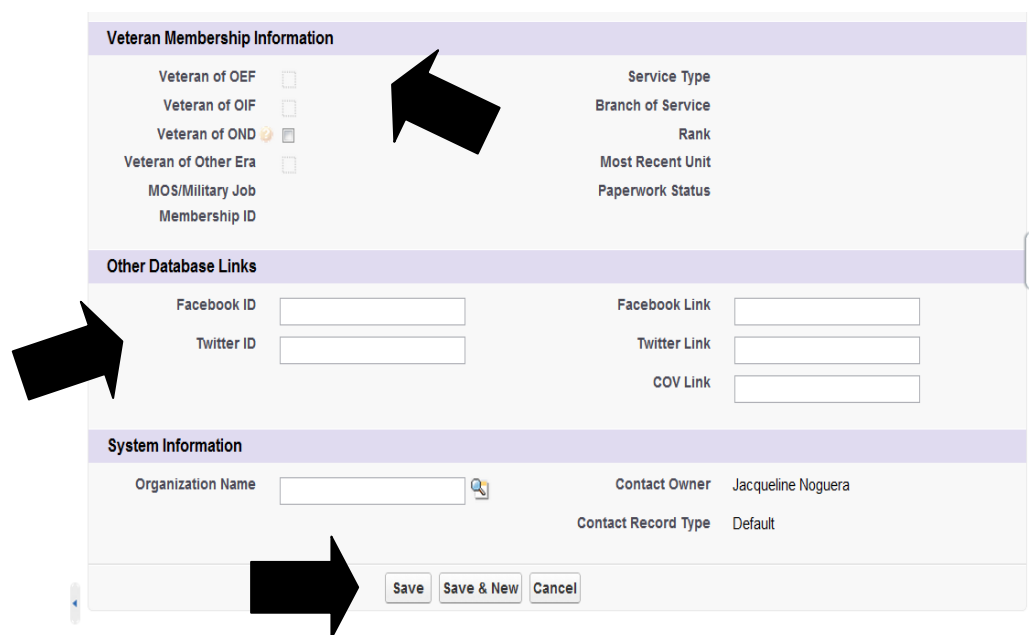
**Address Information** [Copy Primary Address to Secondary Address](#)

Primary Address Type	--None--	Secondary Address Type	--None--
Primary Street	<input type="text"/>	Secondary Street	<input type="text"/>
Primary City	<input type="text"/>	Secondary City	<input type="text"/>
Primary State/Province	<input type="text"/>	Secondary State/Province	<input type="text"/>
Primary Zip/Postal Code	<input type="text"/>	Secondary Zip/Postal Code	<input type="text"/>
Primary Country	<input type="text"/>	Secondary Country	<input type="text"/>
Direct Mail OptOut	<input type="checkbox"/>		
Household	<input type="checkbox"/>		
Home State	--None--		
Home Town	<input type="text"/>		

**Demographic Information**

Gender	--None--	Race	--None--
Birthdate	<input type="text"/>	Marital Status	--None--
		Number of Children	<input type="text"/>
		Occupation	--None--

Veteran data and additional database links can be entered below. **ORGANIZATION NAME.** In the **SYSTEM INFORMATION** section is generated automatically whenever a new contact is entered into the database. Once all data is entered press SAVE to enter the data into the database. Again, corrections or additions can be entered at any time.



**Veteran Membership Information**

Veteran of OEF	<input type="checkbox"/>	Service Type	<input type="text"/>
Veteran of OIF	<input type="checkbox"/>	Branch of Service	<input type="text"/>
Veteran of OND	<input type="checkbox"/>	Rank	<input type="text"/>
Veteran of Other Era	<input type="checkbox"/>	Most Recent Unit	<input type="text"/>
MOS/Military Job	<input type="text"/>	Paperwork Status	<input type="text"/>
Membership ID	<input type="text"/>		

**Other Database Links**

Facebook ID	<input type="text"/>	Facebook Link	<input type="text"/>
Twitter ID	<input type="text"/>	Twitter Link	<input type="text"/>
		COV Link	<input type="text"/>

**System Information**

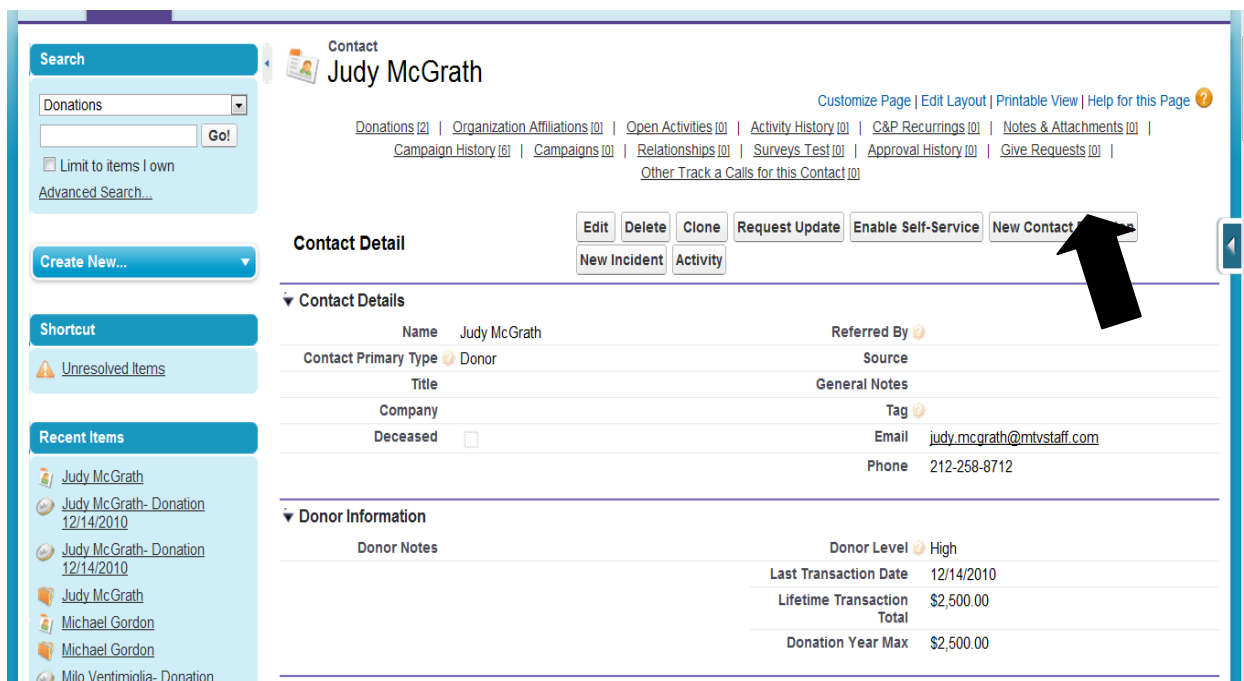
Organization Name	<input type="text"/>	Contact Owner	Jacqueline Noguera
		Contact Record Type	Default

Save Save & New Cancel

Once all contact data is entered and saved the new contact page will look like this. You can review the contact data and edit data from here. Double click on the specific item to edit. Once the entry has been updated, click **SAVE** to finish.

## ENTERING A NEW DONATION

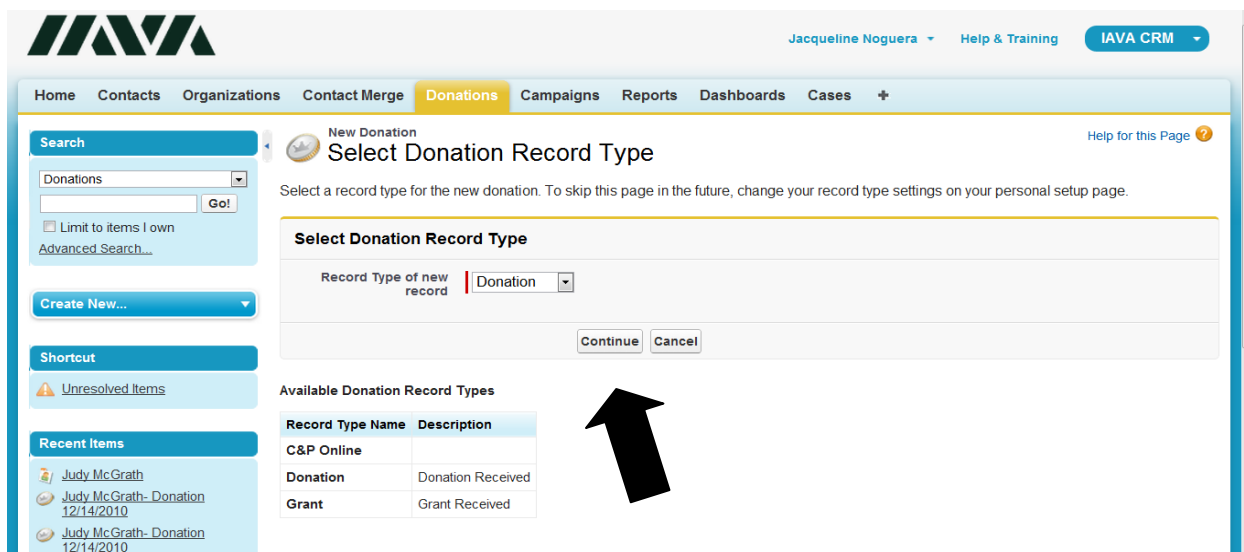
While in the CONTACT record, click the **NEW CONTACT DONATION** button to begin the donation entry process.



The screenshot shows the contact record for Judy McGrath. On the right side, under the 'Contact Detail' section, there is a row of buttons: Edit, Delete, Clone, Request Update, Enable Self-Service, and **New Contact Donation**. A black arrow points to the 'New Contact Donation' button. Below this, there is a 'Donor Information' section with a table showing donor details.

Donor Information	
Donor Notes	Donor Level <span>High</span>
Last Transaction Date	12/14/2010
Lifetime Transaction Total	\$2,500.00
Donation Year Max	\$2,500.00

Once you click **NEW CONTACT DONATION**, you will be taken to the **DONATIONS** tab. **RECORD TYPE OF NEW RECORD** will always be **DONATION** unless the entry is a **GRANT AWARD**. If you forget to do this at the time of entry, you can go back and adjust the type after the fact. Click **CONTINUE**.



The screenshot shows the 'New Donation' screen. The 'Record Type of new record' dropdown menu is set to 'Donation'. Below the dropdown, there is a 'Continue' button and a 'Cancel' button. A black arrow points to the 'Continue' button. The 'Available Donation Record Types' table is also visible.

Record Type Name	Description
C&P Online	
Donation	Donation Received
Grant	Grant Received

# Donation Processing Procedures | 2012

Once you click **CONTINUE** you will be taken to the **NEW DONATION** page. Data marked with a red bar is required for entry.

**DONATION EDIT: DONATION NAME** should be automatically populated. If it is not, stop and consult the administrator. **DONATION OWNER** is the name of staff that entered the donation. **FISCAL YEAR** denotes the year that the donation was received or credited to. Fiscal denotes the year that the donation was received or credited to. Fiscal year runs from Jan 1 to Dec 31.

## EXECUTIVE LEAD

The **CLOSE DATE** is the date the monies are deposited into the bank. **STAGE** denotes whether the donation is a **PLEDGE** which means the donation has not been deposited. **ASK DATE** is the date the **PLEDGE** to donate was made. **CLOSED** is the date the donation has been received and deposited.

**ORGANIZATION NAME** should be populated automatically. If it is not, stop and consult the administrator. **NEXT STEP** denotes Thank You information as in: *TY to Judy McGrath for her donation of \$\_\_\_\_\_.*

Donor	
Organization Name	<input type="text" value="Judy McGrath"/>
Next Step	<input type="text"/>

**PAYMENT DETAILS: AMOUNT** is the amount of the donation. **PAYMENT METHOD** denotes what payment type as in: Check, Money Order, Cash, Credit Card etc. **MEDIUM** denotes the way the donation was made. Donations are made either **ONLINE** via the website or entered manually via the Click and Pledge Virtual Terminal. **OFFLINE is everything else including wire transfers and stock donations.**

Payment Details	
Amount	<input type="text"/>
Payment Method	<input type="text" value="--None--"/>
Medium	<input type="text" value="--None--"/>

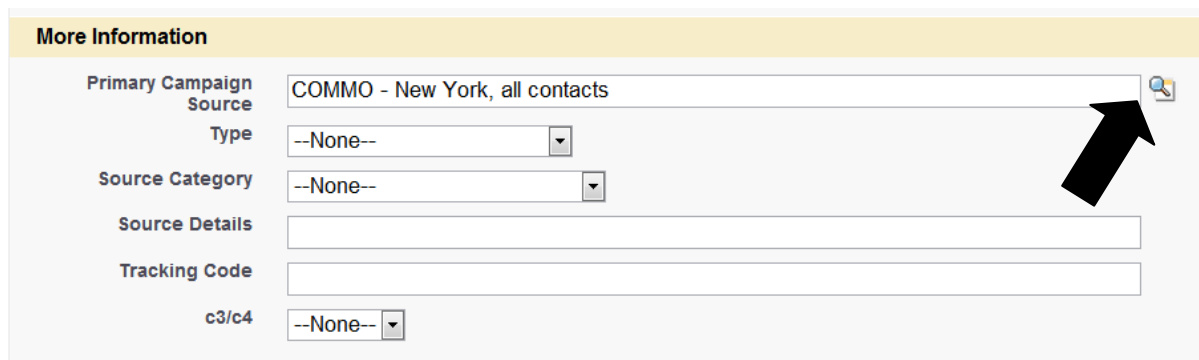
**MORE INFORMATION** contains **PRIMARY CAMPAIGN SOURCE**

**A Campaign is loosely defined a category for donations as in a donation made during a particular event is catagorized under that event e.g. Fall Gala.** However, Salesforce describes campaigns as “a marketing tactic (or series of tactics) that are designed to achieve specific goals such as increased revenue, leads, adoption, etc.” This definition is a good start, but it’s not quite complete. When talking about Salesforce Campaigns, there are plenty of marketing tactics designed to achieve specific goals that won’t show up in Salesforce, including brand sentiment or awareness.


This definition considers the fact that Salesforce Campaigns can handle just about any of the various campaigns described above, including tactics, events and themes. But the marketing/development team has to determine the level of granularity, simplicity or sophistication that needs to be tracked.

When implemented correctly, Campaigns are an excellent tool to track ROI and KPIs, optimize efforts, record marketing activity and provide accountability and visibility to the rest of the company or organization.

To assign a donation to a campaign, first determine from Finance or the Director of Development whether the donation should be assigned to a specific campaign. Once that is determined you can search the database for the correct campaign by typing in the name and pressing the magnifying glass icon at the right of the entry space.



**More Information**

Primary Campaign Source	COMMO - New York, all contacts	
Type	--None--	
Source Category	--None--	
Source Details		
Tracking Code		
c3/c4	--None--	

**TYPE** denotes what or how *'bucket'* the donation should be defined. In this case the options are **INDIVIDUAL DONATION** as from a specific donor. **CORPORATE DONATION** is a donation from a business, **FOUNDATION** donations are from a foundation organization, **SPECIAL EVENT CORPORATE** is a donation or ticket purchase made by a business for a specific event and **SPECIAL EVENT INDIVIDUAL** is a donation or ticket purchase made by a specific person for a specific event.

**SOURCE CATEGORY** further delineates the donation into the following categories:

- **EVENT**
- **EMAIL**
- **EARNED INCOME**
- **DIRECT MAIL**
- **REFFERAL**
- **FACEBOOK**
- **UNSOLICITED**
- **EMPLOYER MATCHING**
- **COMBINED FEDERAL CAMPAIGN**
- **PARTNERSHIP**
- **CHARITABLE FUND DRIVE**
- **IN-KIND DONATION-NON EVENT**
- **INTERNAL TO IAVA**
- **OTHER**
- **YEAR END FUNDRAISING.**





More Information	
Primary Campaign Source	COMMO - New York, all contacts
Type	--None--
Source Category	--None--
Source Details	Event
Tracking Code	Email
c3/c4	Earned Income
	Direct Mail
	Referral
	Facebook
	Unsolicited
	Employer Matching
	Combined Federal Campaign
	Partnership
	Charitable Fund Drive
	In-Kind (non-event)
	Internal to IAVA
	Other
	Year-End Fundraising
<div> <div>In Honor/Memory Of</div> <div>In Honor Name</div> </div>	
<div> <div>System Information</div> <div>CnP Order Number</div> </div>	
<div> <div>Save</div> <div>Save &amp; New</div> <div>Cancel</div> </div>	

**TRACKING CODE** is an ad hoc categorizing tool providing more clarity for each donation. Some examples include: For checks over \$5000.00 the check number should be provided. For multiple donations made in honor or in memory should be categorized by the name of the honorarium or memorial. Further, a campaign can also be created.

**C3 or C4** According to the IRS, "to be tax-exempt under section 501(c)(3) of the Internal Revenue Code, an organization must be organized and operated exclusively for exempt purposes set forth in section 501(c)(3), and none of its earnings may inure to any private shareholder or individual." Typically, charitable organizations receive 501c3 status allowing donors to receive tax deductions for their contributions to these organizations. However, having this status precludes an organization from participating in campaigning and lobbying activities. Conversely, the IRS states that a 501c4 organization operates exclusively to provide social welfare programs and net earnings must be used to support charitable or educational endeavors. According to the IRS, if your organization plans to participate in campaigning or lobbying activities, it can only receive tax-exemption through a 501c4 status.

**ALL DONATIONS SHOULD BE C3 UNLESS OTHERWISE DIRECTED BY FINANCE OR THE DIRECTOR.**

**IN HONOR/MEMORY OF** is a category set aside for donors to contribute in the name of another.

Tracking Code	<input type="text"/>
c3/c4	--None-- 
<b>In Honor/Memory Of</b>	
In Honor Name	<input type="text"/>
<b>System Information</b>	
CnP Order Number	<input type="text"/> 
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

Once all information is entered into the donation record press **SAVE** to enter data into the database. Repeat this process for each donation.

## RUNNING REPORTS

To run a report, find the report you want to run on the Reports tab and click the report name. Most reports run automatically when you click the name. If you're already viewing a report, click **Run Report** to run it immediately or schedule a future run.



### Tip

Sometimes a report returns no results. If you don't see any results, check the report for the following conditions:

The report didn't return any data. Check your filter criteria to make sure some data is returned.

Due to field-level security, you don't have access to one of the groupings you selected.

Your custom summary formula's context didn't match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn't include Industry, no results are returned.

Your values are out of the range of acceptable values. The maximum value allowed is 9999999999999999. The minimum value allowed is -9999999999999999.

## NOTES ON RUNNING REPORTS

### VISIBLE RECORDS

Reports show only the information you can access. This includes records you own, records to which you have read or read/write access, records that have been shared with you, records owned by or shared with users in roles below you in the hierarchy, and records for which you have “Read” permissions.

### PRINTING REPORT FOLDER CONTENTS

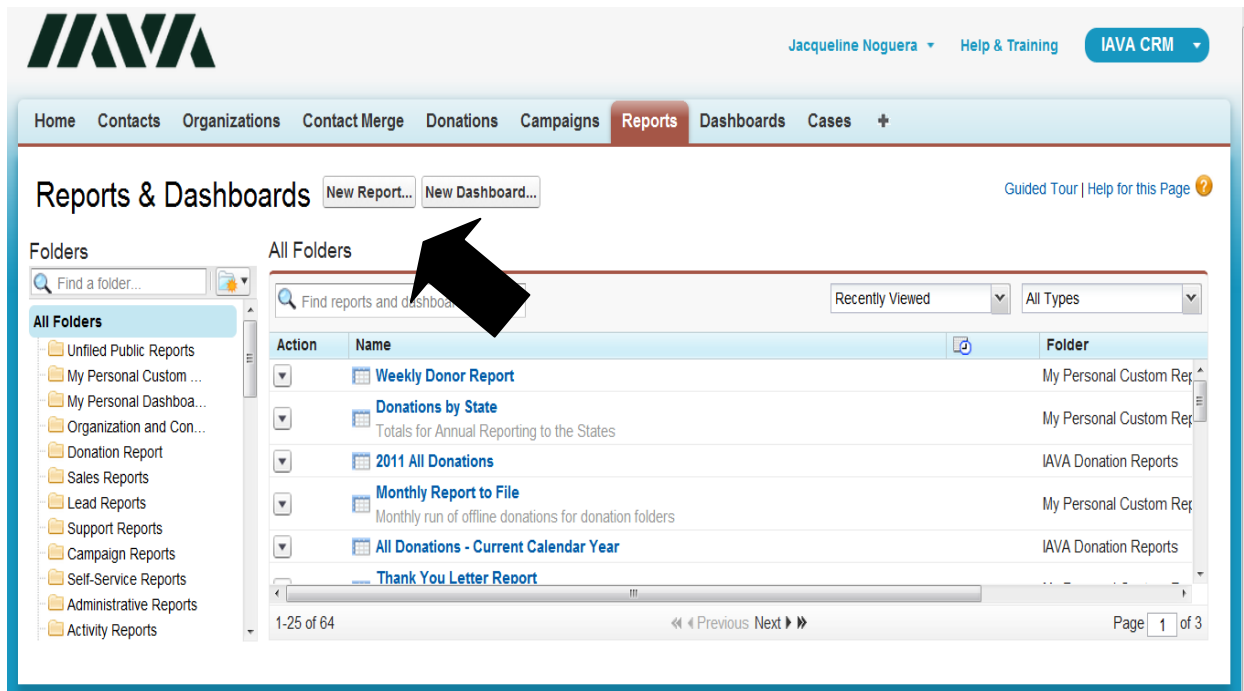
When viewing a list of reports in a particular folder, you can click **Printable View** to open the current list view in a print-ready format.

### RUNNING LARGE REPORTS

If your report returns more than two thousand records, only the first two thousand records are displayed. To see a complete view of your report results, click **Export Details**.

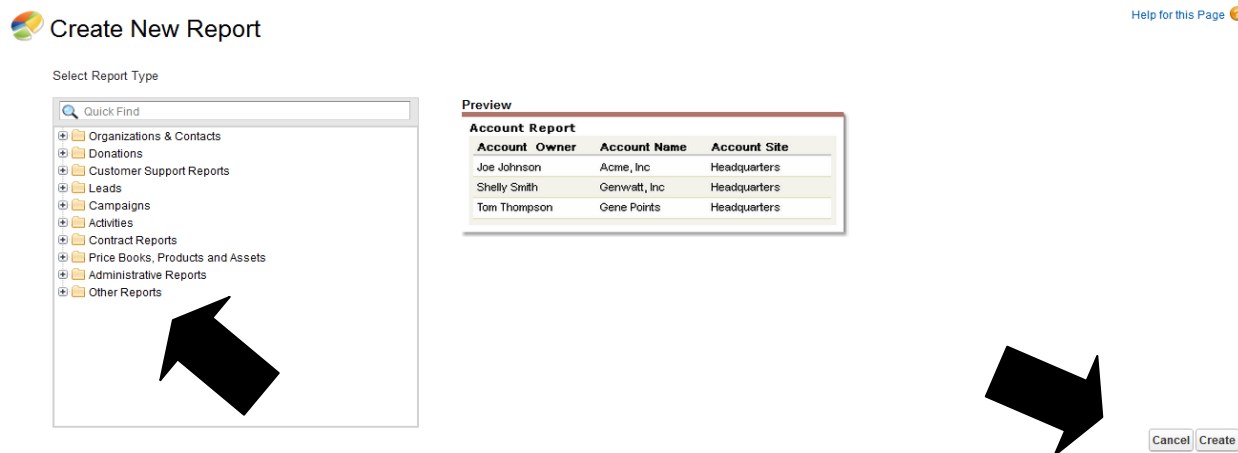
## CREATING A NEW DONATION REPORT

Click on the reports tab and click **NEW REPORT**.



On the left panel you will see the list of **OBJECTS**. Within each object folder there are multiple report types. These reports can be connected to other report objects or be used to display very specific fields to help build reports more efficiently. You can find all of the custom and imported objects in the **OTHER REPORTS FOLDER**.

Click on the donation report type then click **CREATE** on the far right



Depending on the report type the default report fields will be prefilled with helpful fields that may relate to your report. For the most part, these fields are relevant to your report. You may want to add additional items.

To create a new donation report, use the search feature and type in **DONATIONS**. Now you will see several donation report types. Type in the Quick Field what you need in your report. In **WEEKLY DONATION REPORTS**, you will need the following:

- **CLOSE DATE**
- **AMOUNT**
- **NAME OR ORGANIZATION NAME**
- **TYPE**

You can drag each object into the report matrix and place wherever you like. As you click and drag the object into the report you will notice that the object sometimes changes to the color green. This signals that the object is in the correct 'zone' to be dropped. To **DELETE** items from the report matrix just click and drag the object back to the original object directory column on the left.

**Fields**

Quick Find

Drag and drop to add fields to the report.

**Filters**

Show: All donations | Donation Status: Any | Probability: All

Date Field: Close Date | Range: Current FQ | From: 4/1/2012 | To: 6/30/2012

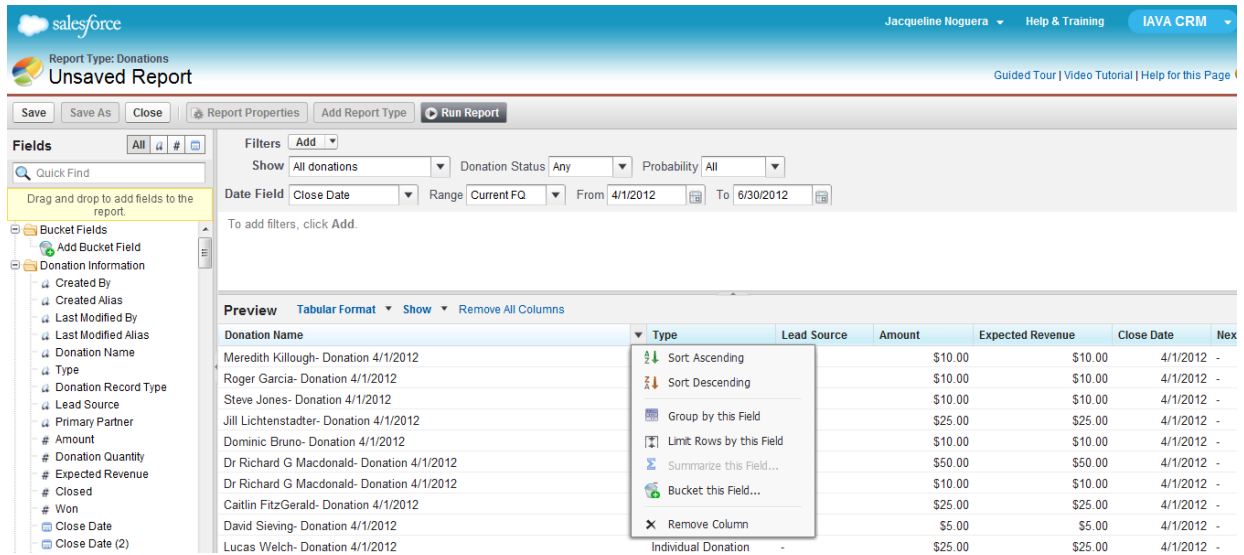
To add filters, click Add.

**Preview** | Tabular Format | Show | Remove All Columns

Donation Name	Type	Lead Source
Meredith Killough- Donation 4/1/2012	Individual Donation	-
Roger Garcia- Donation 4/1/2012	Individual Donation	-
Steve Jones- Donation 4/1/2012	Individual Donation	-
Jill Lichtenstadter- Donation 4/1/2012	Individual Donation	-
Dominic Bruno- Donation 4/1/2012	Individual Donation	-
Dr Richard G Macdonald- Donation 4/1/2012	Individual Donation	-
Dr Richard G Macdonald- Donation 4/1/2012	Individual Donation	-
Caitlin FitzGerald- Donation 4/1/2012	Individual Donation	-
David Sieving- Donation 4/1/2012	Individual Donation	-

To move or remove objects click on the header and drag back to the directory or place in the report where you would like it to appear.

# Donation Processing Procedures | 2012

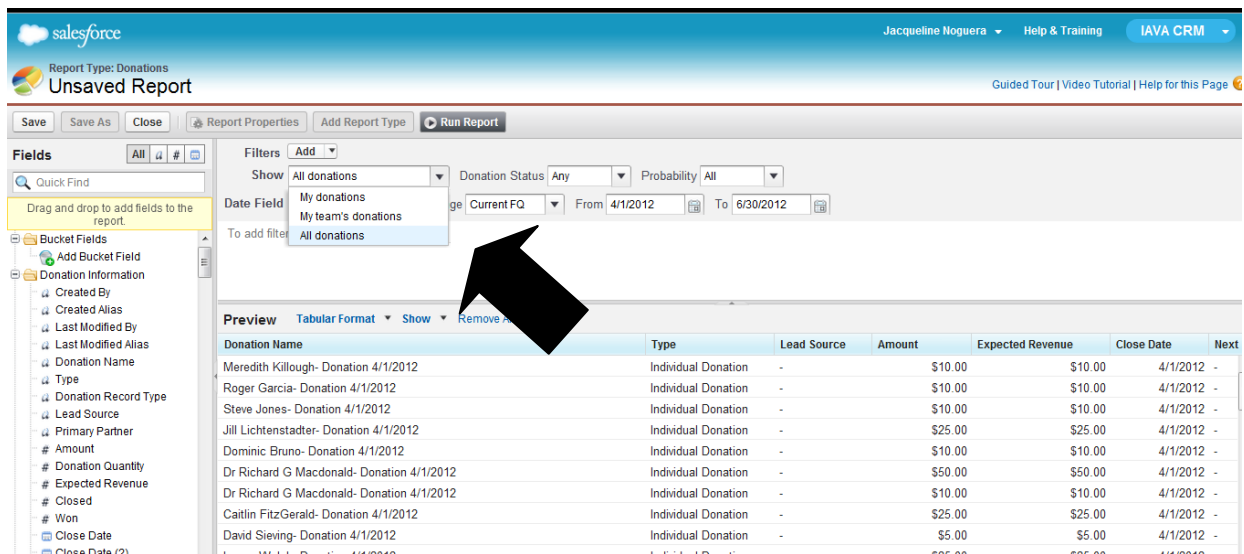


The screenshot shows the Salesforce 'Unsaved Report' interface for 'Donations'. The report is in 'Preview' mode. A context menu is open over the 'Type' column header, showing options: 'Sort Ascending', 'Sort Descending', 'Group by this Field', 'Limit Rows by this Field', 'Summarize this Field...', 'Bucket this Field...', and 'Remove Column'. The report table displays columns: Donation Name, Type, Lead Source, Amount, Expected Revenue, Close Date, and Next. The data includes donations from Meredith Killough, Roger Garcia, Steve Jones, Jill Lichtenstadter, Dominic Bruno, Dr Richard G Macdonald, Dr Richard G Macdonald, Caitlin FitzGerald, David Sieving, and Lucas Welch, all dated 4/1/2012.

Donation Name	Type	Lead Source	Amount	Expected Revenue	Close Date	Next
Meredith Killough- Donation 4/1/2012	Sort Ascending		\$10.00	\$10.00	4/1/2012	-
Roger Garcia- Donation 4/1/2012	Sort Descending		\$10.00	\$10.00	4/1/2012	-
Steve Jones- Donation 4/1/2012			\$10.00	\$10.00	4/1/2012	-
Jill Lichtenstadter- Donation 4/1/2012	Group by this Field		\$25.00	\$25.00	4/1/2012	-
Dominic Bruno- Donation 4/1/2012	Limit Rows by this Field		\$10.00	\$10.00	4/1/2012	-
Dr Richard G Macdonald- Donation 4/1/2012	Summarize this Field...		\$50.00	\$50.00	4/1/2012	-
Dr Richard G Macdonald- Donation 4/1/2012	Bucket this Field...		\$10.00	\$10.00	4/1/2012	-
Caitlin FitzGerald- Donation 4/1/2012	Remove Column		\$25.00	\$25.00	4/1/2012	-
David Sieving- Donation 4/1/2012			\$5.00	\$5.00	4/1/2012	-
Lucas Welch- Donation 4/1/2012	Individual Donation	-	\$25.00	\$25.00	4/1/2012	-

You can sort by any object in the report matrix by clicking the **COLUMN HEADER/OBJECT**. Ascending order is signified by an upward facing arrow to the right of the column header. Click again for descending.

At the top you can click on the **SHOW DROPDOWN** menu and select all donations. To define a date range, choose an option from the drop down menu or type in a specific date range. You can now click **RUN REPORT** to pull the data that you selected for.



The screenshot shows the same Salesforce 'Unsaved Report' interface. The 'Show' dropdown menu is open, displaying options: 'All donations', 'My donations', 'My team's donations', and 'All donations'. A large black arrow points to the 'All donations' option. The report table displays columns: Donation Name, Type, Lead Source, Amount, Expected Revenue, Close Date, and Next. The data includes donations from Meredith Killough, Roger Garcia, Steve Jones, Jill Lichtenstadter, Dominic Bruno, Dr Richard G Macdonald, Dr Richard G Macdonald, Caitlin FitzGerald, David Sieving, and Lucas Welch, all dated 4/1/2012.

Donation Name	Type	Lead Source	Amount	Expected Revenue	Close Date	Next
Meredith Killough- Donation 4/1/2012	Individual Donation	-	\$10.00	\$10.00	4/1/2012	-
Roger Garcia- Donation 4/1/2012	Individual Donation	-	\$10.00	\$10.00	4/1/2012	-
Steve Jones- Donation 4/1/2012	Individual Donation	-	\$10.00	\$10.00	4/1/2012	-
Jill Lichtenstadter- Donation 4/1/2012	Individual Donation	-	\$25.00	\$25.00	4/1/2012	-
Dominic Bruno- Donation 4/1/2012	Individual Donation	-	\$10.00	\$10.00	4/1/2012	-
Dr Richard G Macdonald- Donation 4/1/2012	Individual Donation	-	\$50.00	\$50.00	4/1/2012	-
Dr Richard G Macdonald- Donation 4/1/2012	Individual Donation	-	\$10.00	\$10.00	4/1/2012	-
Caitlin FitzGerald- Donation 4/1/2012	Individual Donation	-	\$25.00	\$25.00	4/1/2012	-
David Sieving- Donation 4/1/2012	Individual Donation	-	\$5.00	\$5.00	4/1/2012	-
Lucas Welch- Donation 4/1/2012	Individual Donation	-	\$25.00	\$25.00	4/1/2012	-

salesforce

Report Type: Donations  
**Unsaved Report**

Save Save As Close Report Properties Add Report Type Run Report

**Fields** All #

Quick Find

Drag and drop to add fields to the report.

Bucket Fields  
Add Bucket Field

**Filters** Add

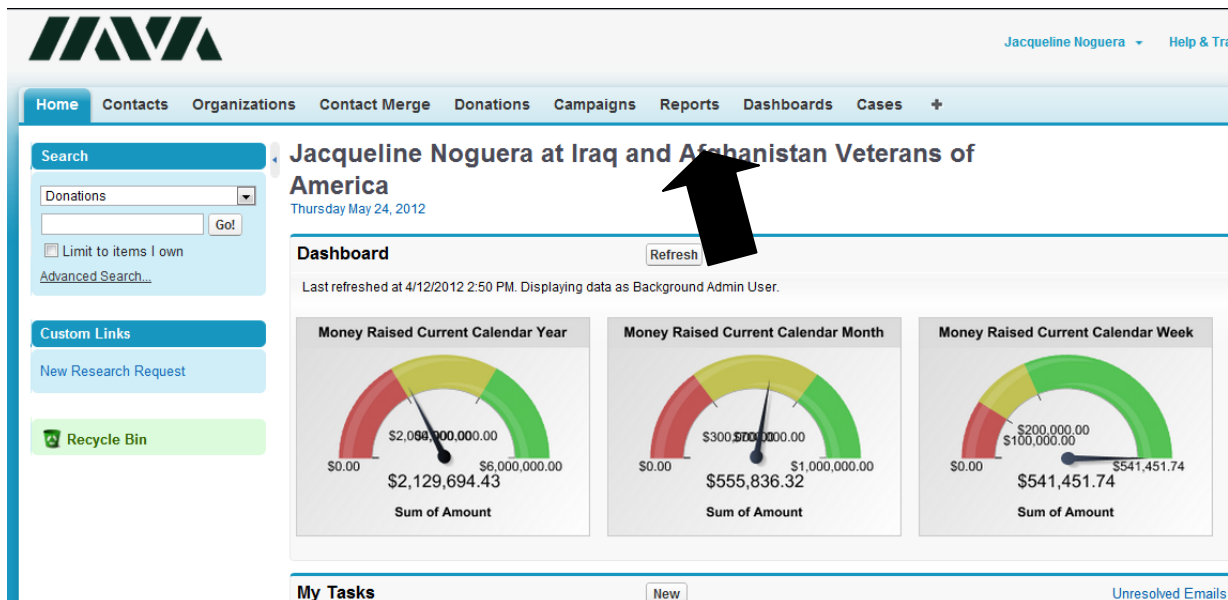
Show All do Donation Status Any

Date Field Close Date Range Current FQ

To add filters, click Add.

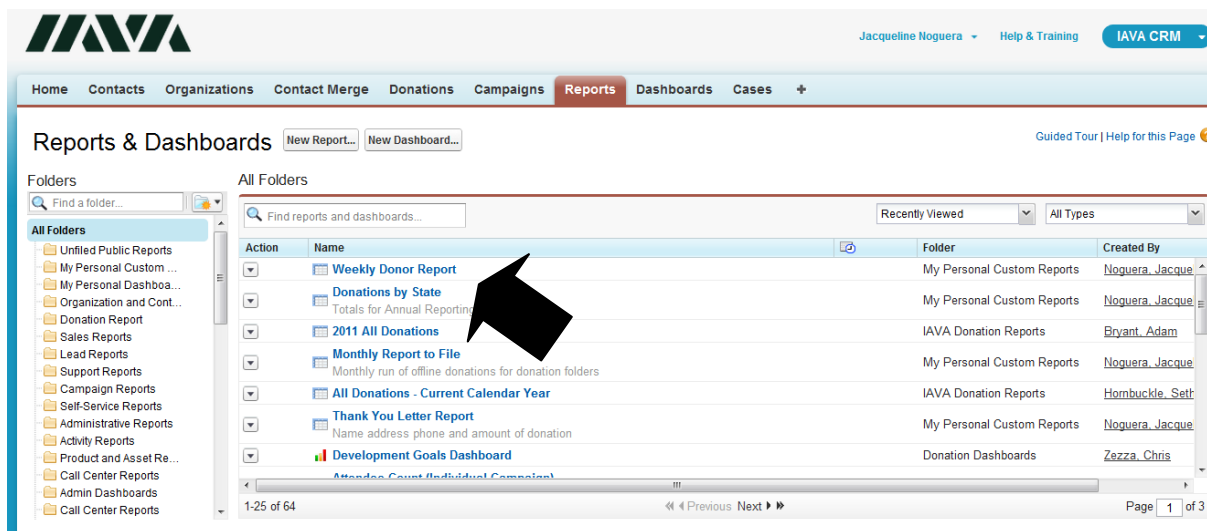
## THE WEEKLY DONOR REPORT

Click on the REPORTS TAB



The screenshot shows the IAVA CRM dashboard. The 'Reports' tab is selected in the top navigation bar. On the left, there is a 'Search' section with a dropdown menu set to 'Donations' and a 'Go!' button. Below this is a 'Custom Links' section with a 'New Research Request' button and a 'Recycle Bin' button. The main content area displays a 'Dashboard' with three gauge charts showing money raised for the current calendar year, month, and week. A black arrow points to the 'Weekly Donor Report' link in the 'All Folders' list on the left side of the dashboard.

Double click on the **WEEKLY DONOR REPORT** to run the report.



The screenshot shows the 'Reports & Dashboards' section of the IAVA CRM. The 'Reports' tab is selected in the top navigation bar. On the left, there is a 'Folders' section with a search bar and a list of folders. The 'All Folders' list includes 'Unfiled Public Reports', 'My Personal Custom Reports', 'My Personal Dashboard', 'Organization and Contact Reports', 'Donation Report', 'Sales Reports', 'Lead Reports', 'Support Reports', 'Campaign Reports', 'Self-Service Reports', 'Administrative Reports', 'Activity Reports', 'Product and Asset Reports', 'Call Center Reports', 'Admin Dashboards', and 'Call Center Reports'. A black arrow points to the 'Weekly Donor Report' link in the 'All Folders' list.



Change the date range to the dates you require and press **RUN REPORT**

**Weekly Donor Report**

Report Generation Status: Note: 2,000 of 2,251 records are displayed below. Select Export Details for a complete view of your data.

System Administrator > Executive Director > Director of Operations > Development Associate  
Hierarchy: [Carly Henderson](#) | [Garrett Gleeson](#) | [Jacqueline Noguera](#) | [Jen Rosa](#)

Report Options:

Summarize information by:

Time Frame  
Date Field:  Range:   
From:  To:

Show:  Donation Status:  Probability:

Close Date	Amount	Organization Name	Type
1/1/2012	\$115.00	<a href="#">Benjamin Johnson</a>	Individual Donation
1/1/2012	\$10.00	<a href="#">Dominic Bruno</a>	Individual Donation
1/1/2012	\$25.00	<a href="#">Jill Lichtenstadter</a>	Individual Donation
			Individual Donation
			Individual Donation

## THANK YOU LETTER REPORT

Click on the **REPORTS** TAB

Choose the **THANK YOU LETTER REPORT**

**Reports & Dashboards**

Guided Tour | Help for this Page

Folders

Find a folder...

All Folders

- Unfiled Public Reports
- My Personal Custom ...
- My Personal Dashboa...
- Organization and Cont...
- Donation Report
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports
- Self-Service Reports
- Administrative Reports
- Activity Reports
- Product and Asset Re...
- Call Center Reports
- Admin Dashboards
- Call Center Reports

All Folders

Find reports and dashboards...

Recently Viewed

Action	Name	Folder	Created By
<input type="checkbox"/>	<a href="#">Weekly Donor Report</a>	My Personal Custom Reports	<a href="#">Noguera, Jacqu...</a>
<input type="checkbox"/>	<a href="#">Donations by State</a>	My Personal Custom Reports	<a href="#">Noguera, Jacqu...</a>
	Totals for Annual Reporting to the States		
<input type="checkbox"/>	<a href="#">2011 All Donations</a>	IAVA Donation Reports	<a href="#">Bryant, Adam</a>
<input type="checkbox"/>	<a href="#">Monthly Report to File</a>	My Personal Custom Reports	<a href="#">Noguera, Jacqu...</a>
	Monthly run of offline donations for donation folders		
<input type="checkbox"/>	<a href="#">All Donations - Current Calendar Year</a>	IAVA Donation Reports	<a href="#">Hombuckle, Set...</a>
<input type="checkbox"/>	<a href="#">Thank You Letter Report</a>	My Personal Custom Reports	<a href="#">Noguera, Jacqu...</a>
	Name address phone and amount of donation		
<input type="checkbox"/>	<a href="#">Development Goals Dashboard</a>	Donation Dashboards	<a href="#">Zezza, Chris</a>
	<a href="#">Attendee Count (Individual Campaign)</a>		

1-25 of 64

Page 1 of 3

Change the date range to the dates you require and press **RUN REPORT**

## Thank You Letter Report

Report Generation Status: Complete

**System Administrator > Executive Director > Director of Operations > Development Associate**  
Hierarchy: [Garrett Gleeson](#) | [Jacqueline Noguera](#) | [Jen Rosa](#)

Report Options:

Summarize information by:

--None--

Time Frame

Date Field

Close Date

Range

Custom

From

1/17/2012

To

5/2/2013

Show

All donations

Donation Status

Closed

Probability

All

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Filtered By: [Edit](#)

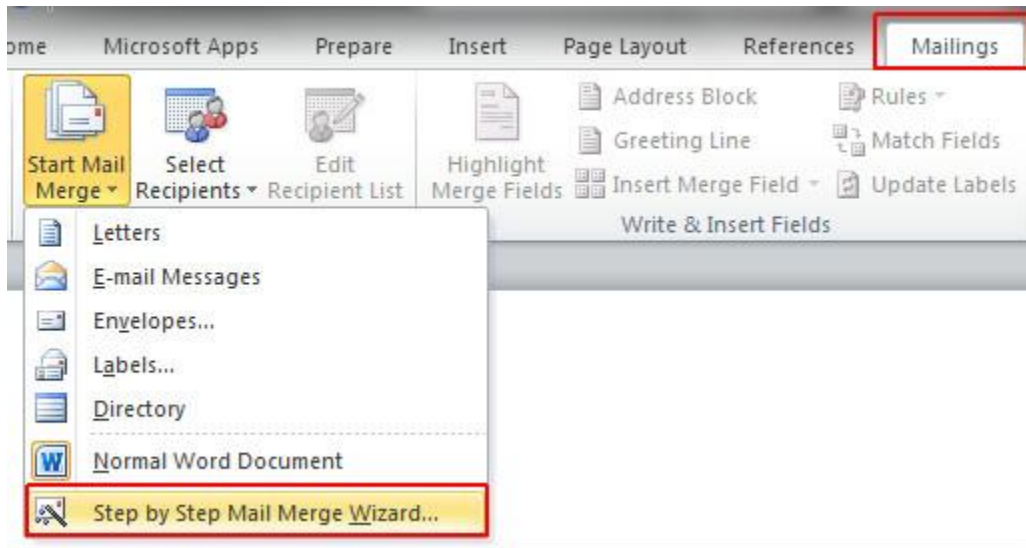
Medium equals Offline [Clear](#)

Close Date	Amount	Organization Name	Billing Address Line 1	Billing City	Billing State/Province	Billing Zip/Postal Code
1/17/2012	\$1,000.00	<a href="#">Jewish Community Foundation of Los Angeles</a>	6505 Wilshire Blvd	Los Angeles	CA	90048
1/17/2012	\$368.42	<a href="#">United Way of Lackawanna and Wayne Counties</a>	615 jefferson	scranton	pa	18510-1630
1/17/2012	\$25.00	<a href="#">Douglas Fuller</a>	5 Locust Lane	Ringwood	NJ	07456
1/17/2012	\$25.00	<a href="#">Levon Levi</a>	1264 Sunnyside Road	Prescott	AZ	86303
1/17/2012	\$224.60	<a href="#">IBM Foundation Software Center</a>	4704 North Street	Bedford	MA	01730

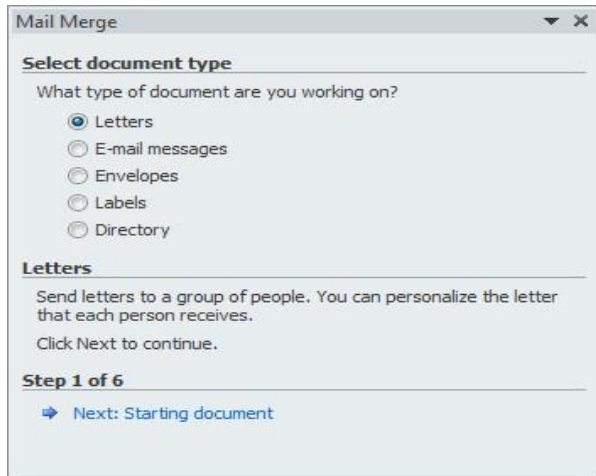
## THANK YOU NOTES AND MAIL MERGE

**WORD** includes **MAIL MERGE** feature, which enables user to create documents (Letter, Emails, Fax etc) that are essentially the same but contains unique elements such as recipient Name, Address, Contact No, City, State, etc. It helps user to create a document for multiple recipients more easily by just selecting recipient names and choosing the document. Personal details of the respective recipient will be automatically added in the document which prevents users to write each recipient's personal info in every document, eventually saving a lot of time.

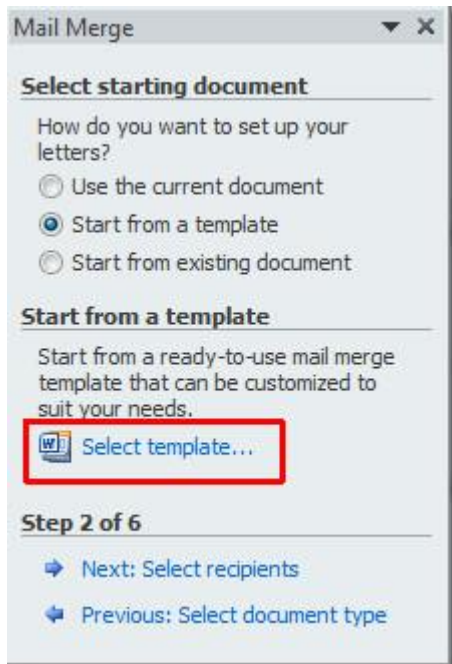
**Launch Word 2010**, Navigate to **MAILINGS** tab, and from **START MAIL MERGE** options, click *Step by Step Mail Merge Wizard*.



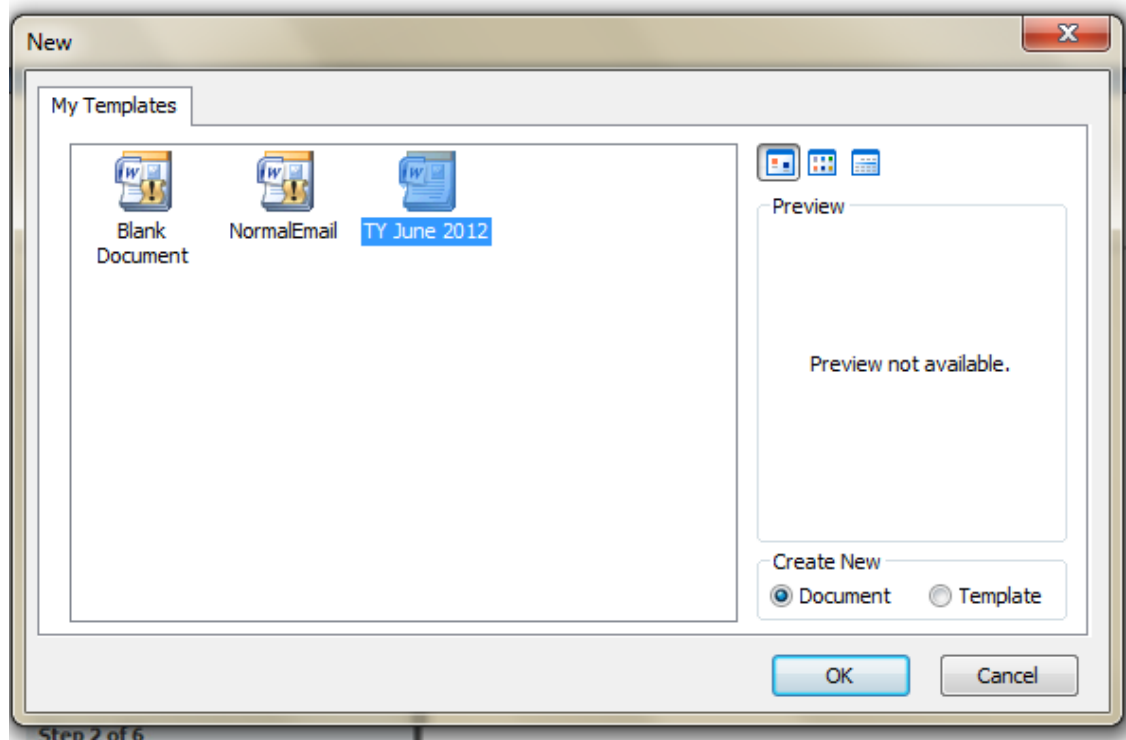
This will bring up **MAIL MERGE** dialog at the side of the Word document window, here you can specify type of document you want to create, we will select **LETTERS**, click **NEXT: STARTING DOCUMENT** from the bottom of the dialog.



In this step, you will be provided with different options to create **LETTERS**, choose simple procedure by selecting by template. Click **SELECT TEMPLATE**.



This will bring up *Select template* dialog, choose a suitable template. We will be using **TY JUNE 2012** template. Click **OK** to continue.



At the left side of the window you can see the template is imported into document, from right-pane, click **NEXT: SELECT RECIPIENTS..**



*Fighting for our nation's  
newest generation of heroes.*

ras Rd  
95035-7214

2

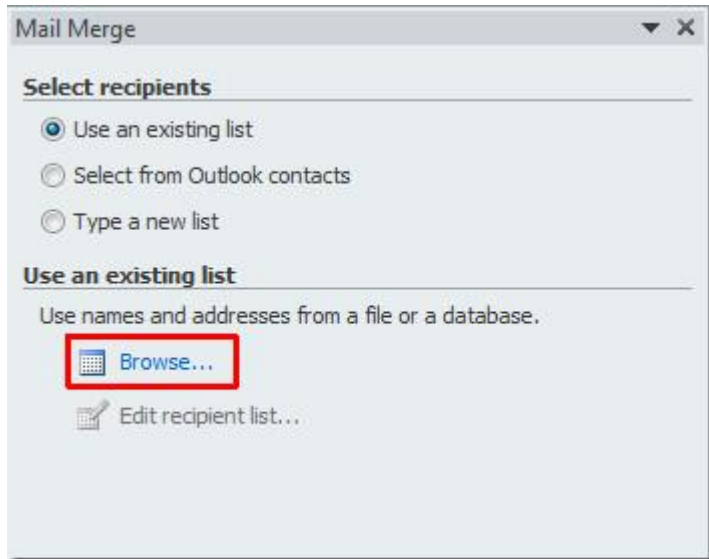
for your \$25 donation\* to Iraq and Afghanistan Veterans of America (IAVA). Welcome to our  
if supporters! Your commitment and encouragement are vital for us to continue our mission to  
lives of Iraq and Afghanistan veterans and their families.

ide of war, Iraq and Afghanistan troops, veterans and their families need your support more

lion Americans have served in Iraq or Afghanistan to date, and hundreds of thousands have been



In this step, you can choose different options to import recipient list, we will select an existing list, hit Browse to import desired recipients list.

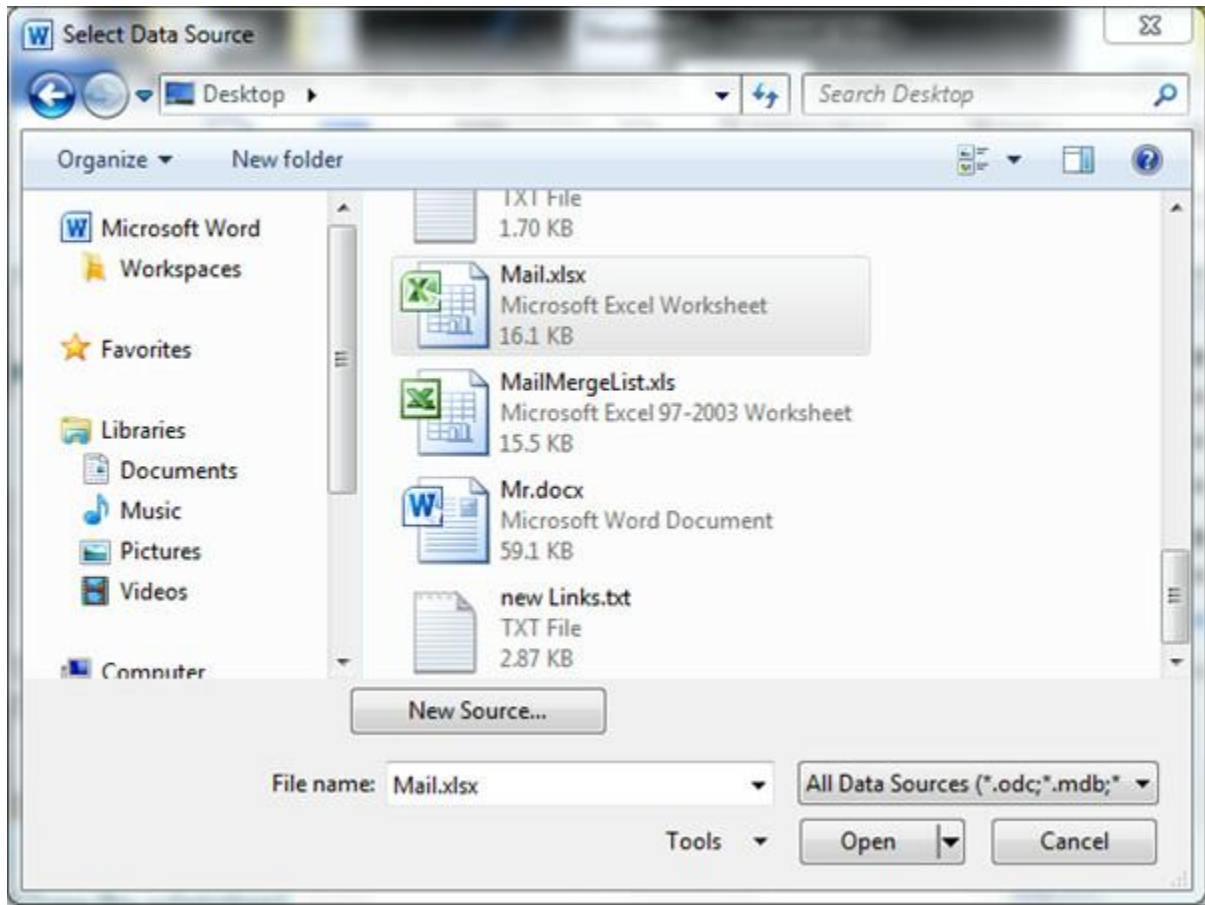


Using the recipients list created In **EXCEL 2010**. The name of the worksheet is **MAIL**. Import to Word **MAIL MERGE**.

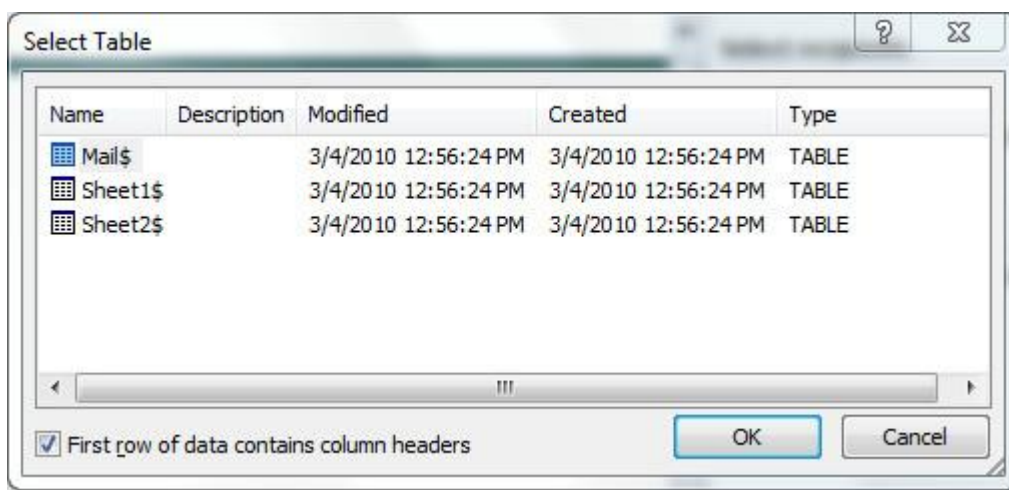
	A	B	C	D	E	F	G
1	Title	First Name	Last Name	Street	City	Zip	
2	Mr.	Jack	Smith	124 Huaritz lane	Akron	65445	
3	Mr.	Billy	hyte	22 park ave	Montgomery	23232	
4	Mr.	Von	Mcfaden	445 St huter	Richmond	44533	
5	Mr.	Steven	Shwimmer	12 Briks way	Chul vista	34534	
6	Mr.	Ruby	jason	11 gerado Ave	Garland	76456	
7	Mr.	Mark	Dyne	211 ceana way	Lubbock	54445	
8	Mr.	Philip	namdaf	4201 nybe st	Baton Rouge	74564	
9	Mr.	Erik	Bawn	22 banson st	Akron	76665	
10	Mr.	Ricky	ben	11 lyle Ave	Akron	22344	
11	Mr.	Miecky	Johanason	121 french Ave	Boise	24534	
12							

The screenshot shows an Excel spreadsheet with a table of recipient data. The table has columns for Title, First Name, Last Name, Street, City, and Zip. The data is listed for 11 rows. The 'Mail' worksheet tab is highlighted with a red rectangle in the bottom left corner of the Excel window.

Choose an Excel worksheet, click **OPEN** to import.

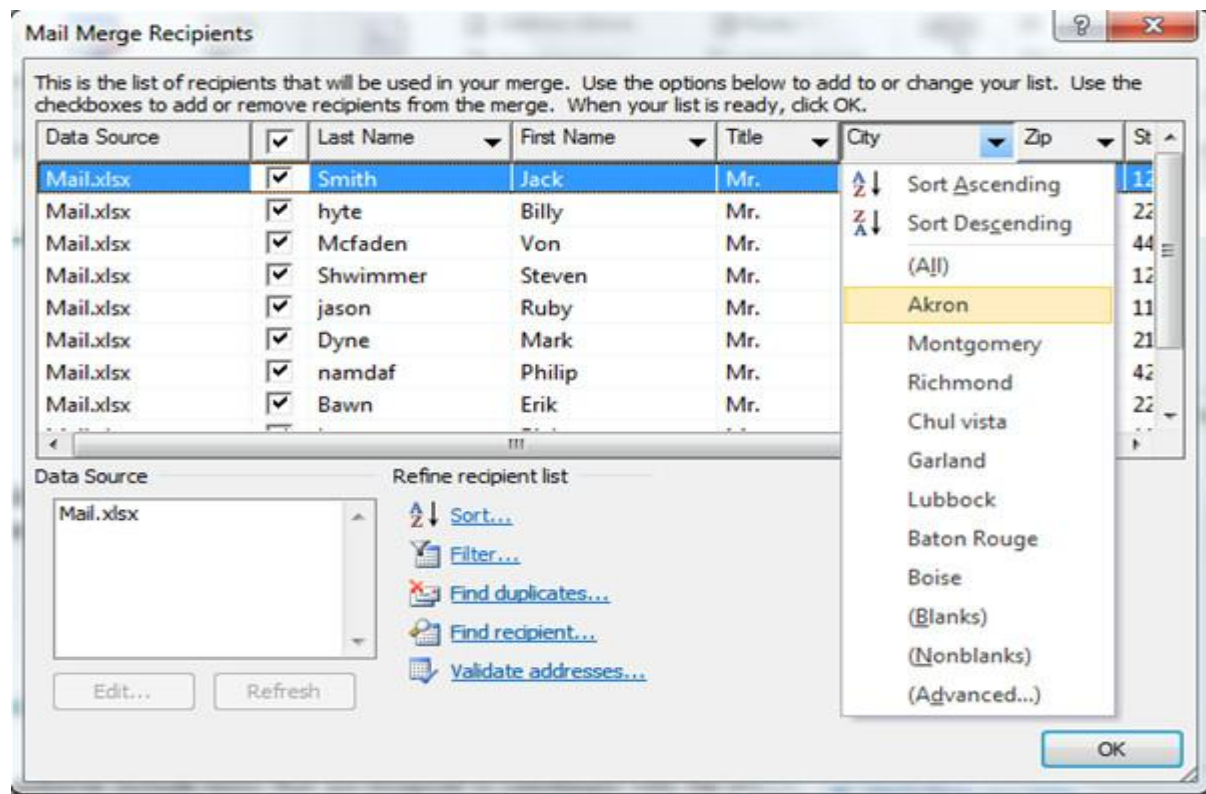


**SELECT TABLE** dialog will appear, now choose the worksheet which contains required data, if first row contains column headings, then enable *First row of data contains column headers* option, and click **OK**.



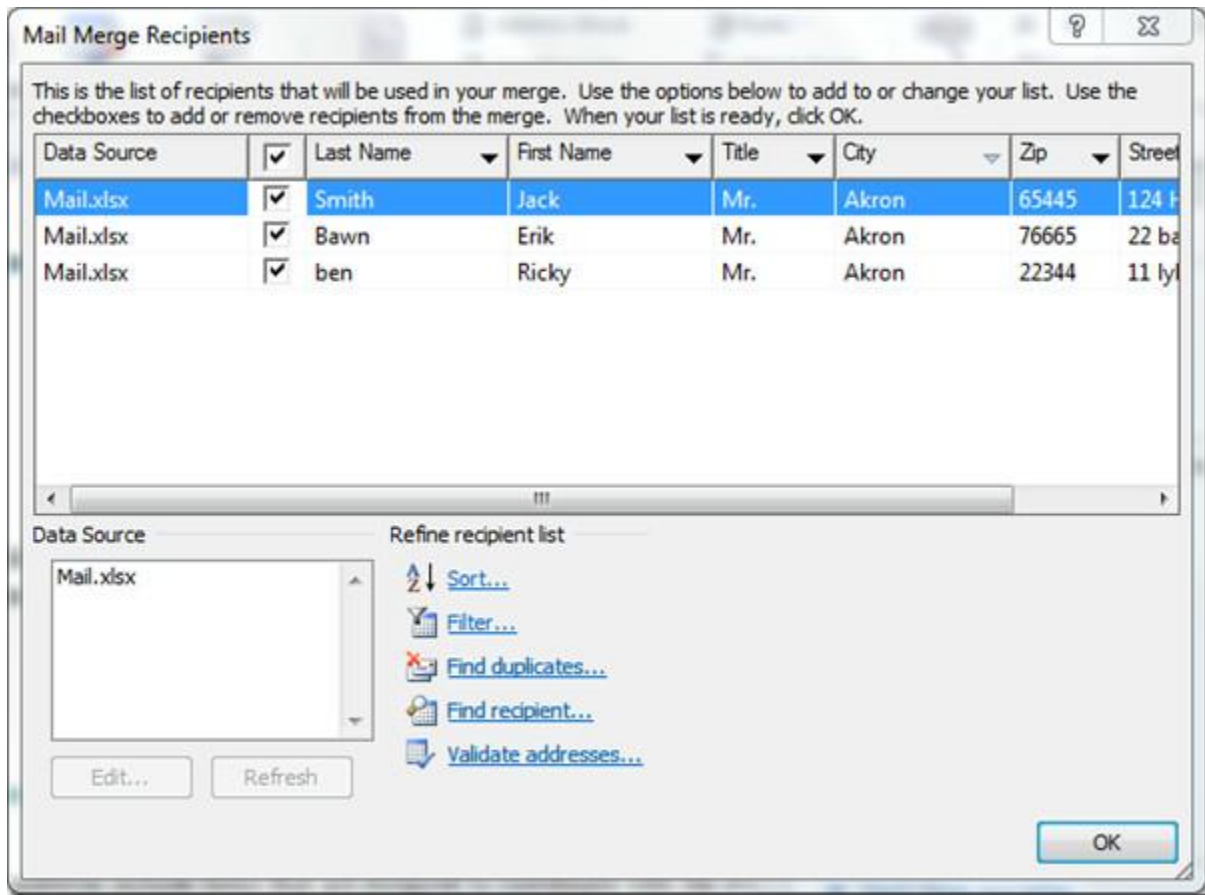


You will see the *Mail* worksheet in the *Mail Merge Recipients* dialog. Here you can filter down the recipients on the basis of column headings. If we want to send letters to the recipients living in city *Akron*. We will select Akron from *City* drop-down options.

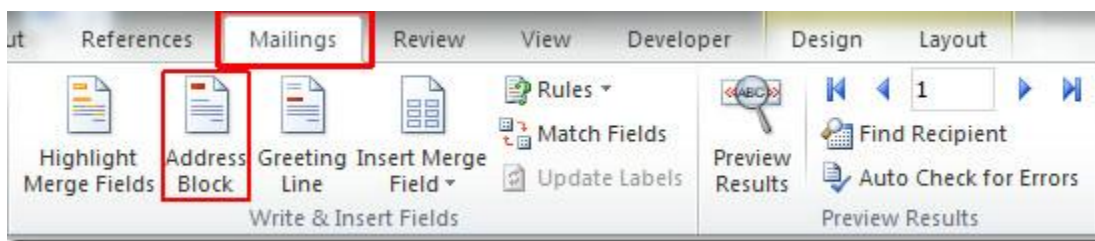


Upon click, it will show only the recipients living in Akron. Here you can also perform different actions over the list such as; *Sort*, *Filter*, *Find duplicates*, *Find recipients*, and *validate address*. Click *OK* to proceed further.



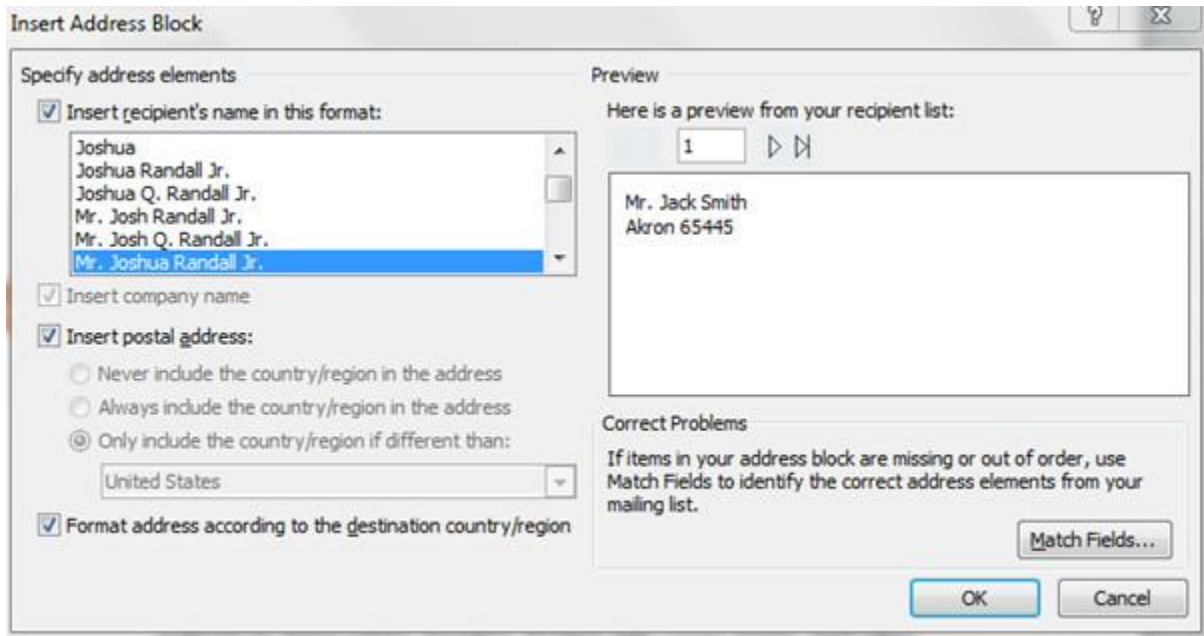


Now navigate to *Mailings* tab, and click *Address Block*.

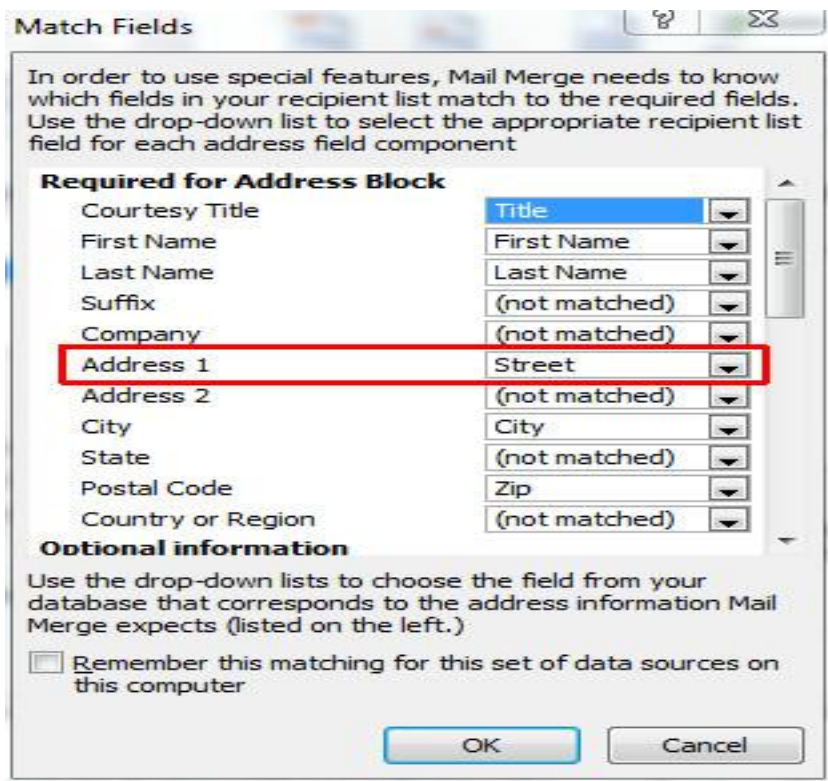


You will reach *Insert Address Block* dialog, from *Specify address elements*, choose format in which you want to show recipient name.

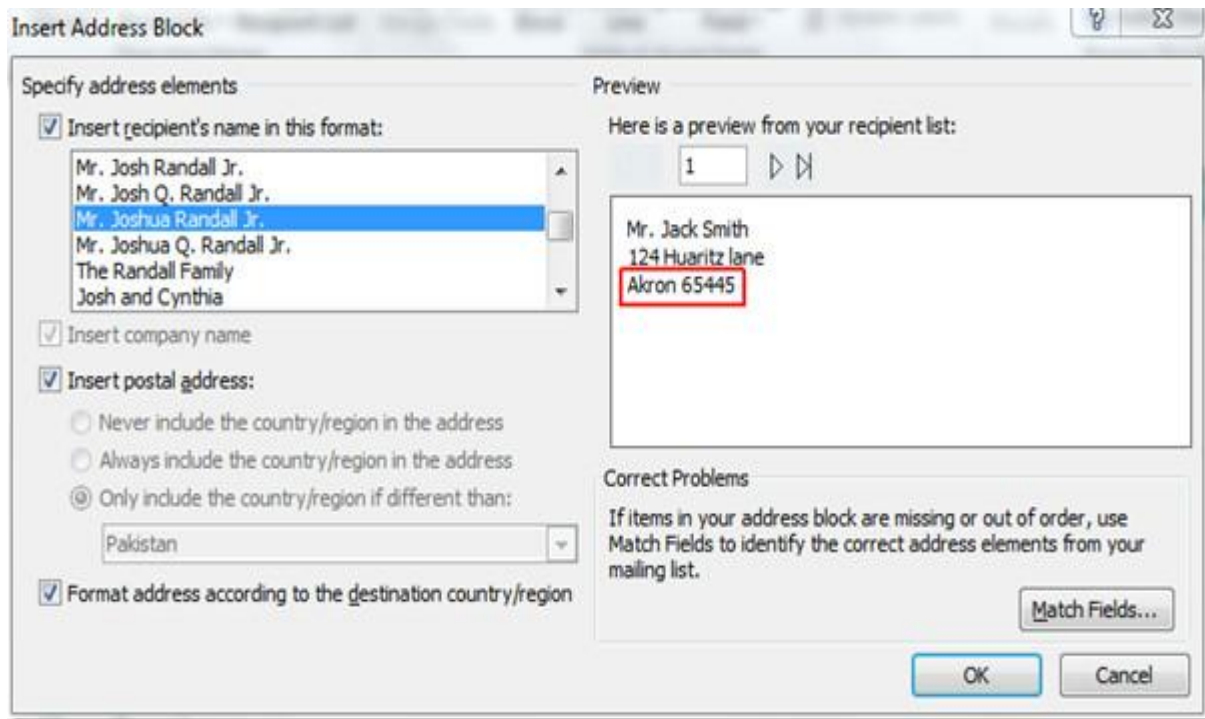
Under *Preview* you can see the preview of the changes that affects. Under *Correct problems*, click *Match Fields* to insert new field in the letter, as we want to include address of the recipient.



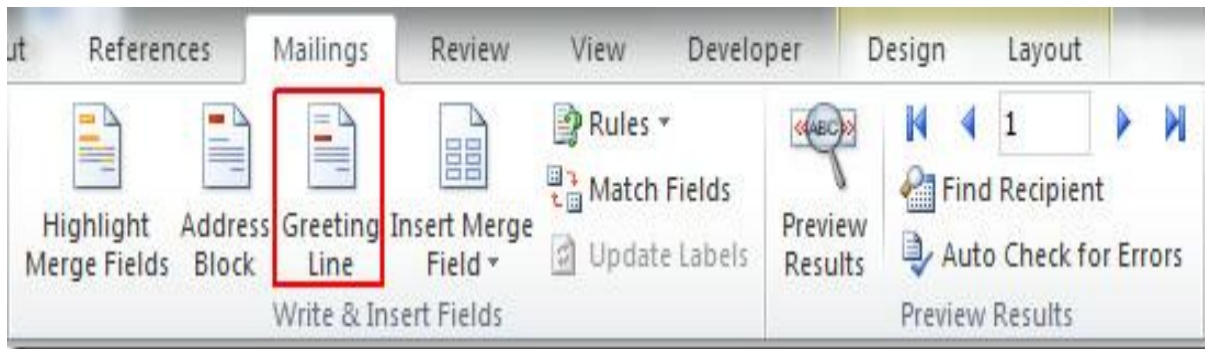
Match Fields dialog will appear, now from *Address 1* options select *Street*. That will include the name of the street. You can also include other fields if required. Click *OK* to continue.



You will see the address is added in to the format as shown the screenshot below. Click *OK* to continue.

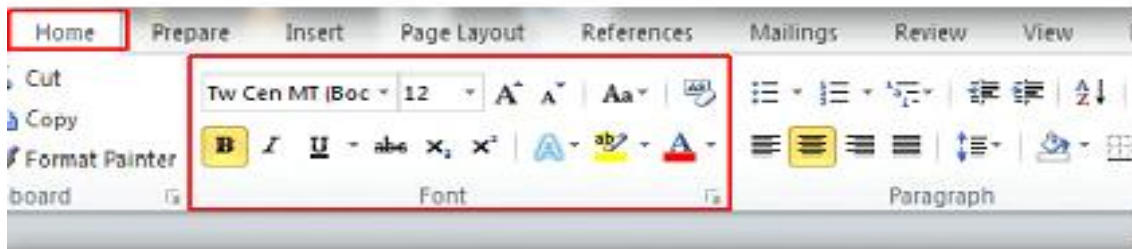


Now we will customize the greeting message, for that navigate to *Mailings* tab, and click *Greeting Line*.



In *Insert Greeting Line* dialog, you can choose desired greeting format from *Greeting Line format*. Under *Greeting line for invalid recipient names* choose the format for unknown recipients. Under *Preview*, it show the preview of of the changes you made. Click *OK* to continue.

Now to make *Address Block* more prominent, navigate to *Home* and apply color and font styles over it.



IRAQ AND AFGHANISTAN VETERANS OF AMERICA

Elizabeth Wood  
10 Jacob Gates Road  
Harvard, MA 01451

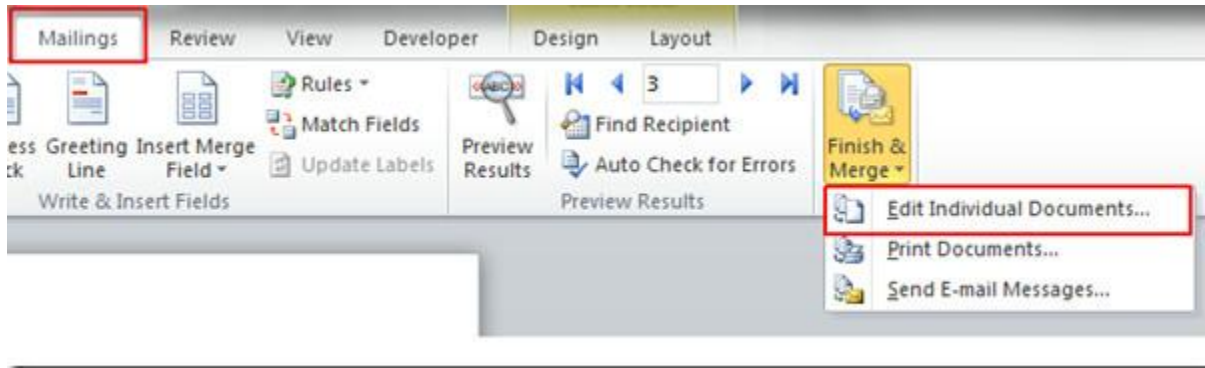
May 23, 2012

Dear Elizabeth,

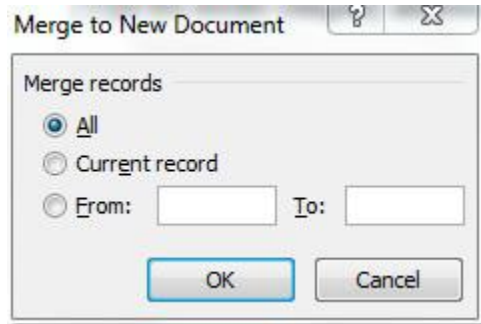
**Thank you for your \$200 donation\* to Iraq and Afghanistan Veterans of America**  
community of supporters! Your commitment and encouragement are vital for us to



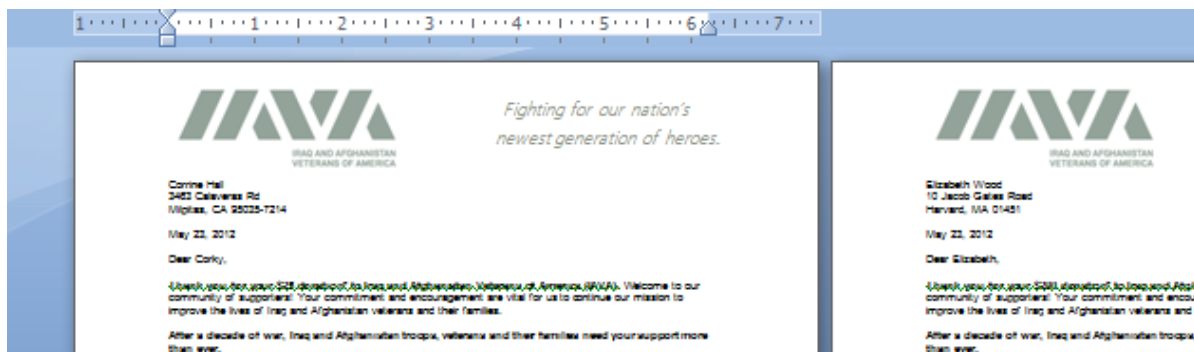
Navigate to *Mailings* tab, and from *Finish & Merge* menu, click *Edit Individual Documents*.



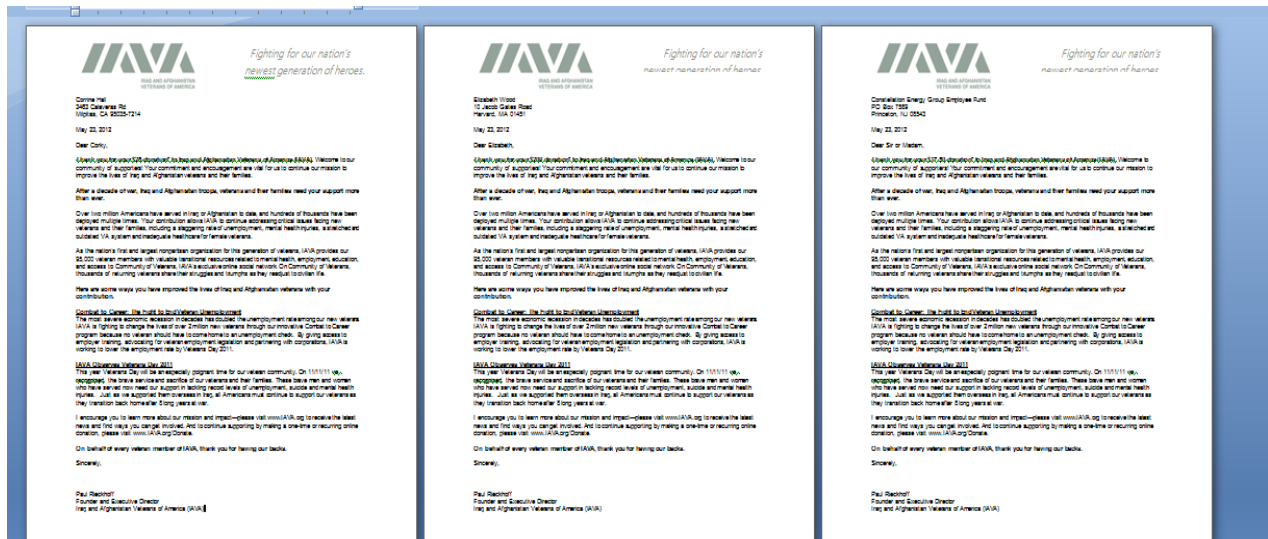
It will bring *Merge to New Document* dialog, you can choose *Current record*, we will select *All* to view all the recipients. Click *OK* to show the letter of each recipient.



Now as you can see in the screenshot below, Mail Merge created letters of each recipients residing in city Akron with their respective street names.



# Donation Processing Procedures 2012



By using Mail Merge, you can also create:

**A set of labels or envelopes:** The return address is the same on all the labels or envelopes, but the destination address is unique on each one.

**A set of form letters, e-mail messages, or faxes:** The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.


## CLICK AND PLEDGE

Within the Click and Pledge donor management system is a virtual terminal where you can manually run credit card and echeck transactions.

To run a transaction you simply fill in the required fields

Required fields are marked in **RED**.

The screenshot displays the 'CLICK & PLEDGE' Donor Management system interface. The top navigation bar includes links for Home, Households, Organizations, Patrons, Opportunities, Dashboards, C&P Transactions, C&P Recurrings, C&P Reports, C&P Import, and C&P Virtual Terminal (which is highlighted). A search bar for patrons is also present. The left sidebar contains a 'Create New' button, a 'Recent Items' section with 'No records to display', and a 'Recycle Bin' button. The main content area is the 'C&P Virtual Terminal' form, which is divided into several sections: 'Payment Description' (with fields for Payment for, Amount \$, Deductible \$, Discount \$, Shipping \$, and Tax \$), 'Recurring' (with a checkbox for 'Is this a recurring payment'), 'Billing Information' (with a search bar and fields for First Name, Last Name, Address1, Address2, City, State, Zip/Postal Code, Country, Province (non-US), Phone, and Confirm Email), 'Tracker & Campaigns' (with fields for Tracker and Campaign), and 'Payment Method'.

## RECURRING PAYMENT

You may also set up a transaction to be a recurring transaction.

There are two different types of recurring transactions. The installment option will break a larger amount into smaller amounts like an installment plan. The subscription option repeats the same transaction amount. Both plans allow you to choose the period of time the payment is to reoccur and the length of time it will last.

The screenshot shows the 'C&P Virtual Terminal' interface. The top navigation bar includes links for 'ations', 'Patrons', 'Opportunities', 'Dashboards', 'C&P Transactions', 'C&P Recurrings', 'C&P Reports', 'C&P Import', and 'C&P Virtual Terminal'. The main form is divided into three sections:

- Payment Description:** Includes fields for 'Payment for' (set to 'Donation'), 'Amount \$' (100), 'Deductible \$' (100), 'Discount \$' (0), 'Shipping \$' (0), and 'Tax \$' (0).
- Recurring:** Includes a checkbox for 'Is this a recurring payment' (checked), 'Recurring Type' (dropdown), 'Periodicity' (dropdown), '# of installments' (0), and 'Ending date'.
- Billing Information:** Includes a search bar 'search by first name, last name, or email', an 'Existing Patron' field with a 'Load' button, and fields for 'First Name', 'Last Name', 'Address1', and 'Address2'.

Here under the billing information the system does allow you to look up an established donor within the click and pledge donor management application. You can look them up using first name, last name or email address.

This screenshot shows the 'Recurring' and 'Billing Information' sections of the form with more detailed data:

- Recurring:** 'Is this a recurring payment' is checked. 'Recurring Type' is set to 'Subscription', 'Periodicity' is 'Monthly', and '# of installments' is 12.
- Billing Information:** The search bar contains 'su'. The 'Existing Patron' field shows 'Higgs, Sue, susan@clickandpledge.com'. Below this are fields for 'Address1', 'Address2', 'City', 'State' (dropdown), 'Country' (dropdown), 'Zip/Postal Code', 'Province (non-US)', 'Phone', and 'Confirm Email'.
- Tracker & Campaign:** Includes fields for 'Tracker' and 'Campaign'.



Click on it and then click **LOAD** and the data will autofill the information for you.

The screenshot shows a web form for processing donations. It is divided into three main sections with light blue headers:

- Recurring:** Contains a checkbox for "Is this a recurring payment" (checked), a dropdown for "Recurring Type" (set to "Subscription"), a dropdown for "Periodicity" (set to "Monthly"), a text field for "# of installments" (set to "12"), and a text field for "Ending date".
- Billing Information:** Contains a search bar with the text "search by first name, last name, or email" and a "Load" button. Below this are fields for "Existing Patron" (filled with "Higgs, Sue, susan@clickandpledge.com"), "First Name" (filled with "Sue"), "Last Name" (filled with "Higgs"), "Address1" (filled with "123 Bay St."), "Address2" (empty), "City" (filled with "Hattiesburg"), "State" (dropdown set to "Mississippi"), "Zip/Postal Code" (filled with "39401"), "Country" (dropdown set to "United States of America"), "Province (non-US)" (empty), "Phone" (filled with "(540) 961-9811"), "Email" (filled with "susan@clickandpledge.cc"), and "Confirm Email" (filled with "susan@clickandpledge.cc").
- Tracker & Campaign:** Contains a "Tracker" text field and a "Campaign" text field.

If that person is not a current donor in the system then simply just fill in the fields.

The system uses a person's email address to recognize if it is a new donor or existing one.

Since donors may have the same last names first names etc. but not the same email address it is a good way to identify donors. Basically this is used as a unique identifier.

To make sure that the data being put into the system is accurate please use the donor's correct email address.


Tracker and Campaign information can also be added and be aware that it is case sensitive.

Under pay method you can choose credit and echeck and then put that information in those fields.

## Donation Processing Procedures | 2012

Province (non-US)  Phone   
Email  Confirm Email


**Tracker & Campaign**  
Tracker  Campaign

**Payment Method**  
☒ Credit Card ☐ eCheck  
  
Name (as it appears on card)  Credit Card Number   
Expiration   Card Security Number   
☐ I understand that this charge will appear as Test Account on my bank statement.

Click on "I understand that this charge will appear as IAVA on my bank statement"  
Then click PROCESS PAYMENT to begin the transaction process.

Province (non-US)  Phone   
Email  Confirm Email

**Tracker & Campaign**  
Tracker  Campaign

**Payment Method**  
☒ Credit Card ☐ eCheck  
  
Name (as it appears on card)  Credit Card Number   
Expiration   Card Security Number   
☒ I understand that this charge will appear as Test Account on my bank statement.

The next screen will inform you that the transaction is being processed.

The screenshot shows a donation processing form with the following sections:

- Amount:** Amount \$ 100, Deductible \$ 100, Discount \$ 0, Shipping \$ 0, Tax \$ 0.
- Recurring:** Is this a recurring payment? ☒ Yes. Recurring Type: Subscription, Periodicity: Monthly, # of installments: 12, Ending date: [empty].
- Billing Information:** Search by first name, last name, or email. Existing Patron: Higgs, Sue, susan@clickandpledge.com. Load button. Fields for First Name (Sue), Address1 (123 Bay St), City (Hattiesburg), State (Mississippi), Zip/Postal Code (39401), Country (United States of America), Province (non-US), Phone ((540) 961-9611), Email (susan@clickandpledge.com), and Confirm Email (susan@clickandpledge.com).
- Tracker & Campaign:** Tracker [empty], Campaign [empty].
- Payment Method:** Credit Card (selected) or eCheck. Logos for Visa, MasterCard, Discover, and American Express. Name (as it appears on card): Susan higgs, Credit Card Number: 4111111111111111, Expiration: 11/2020, Card Security Number: 123. A checkbox is checked: "I understand that this charge will appear as Test Account on my bank statement."

A white box with black text in the center of the form reads: "We are processing your request. Please wait."

The next screen give notification that the transaction has been processed.

The screenshot shows a 'Processing Result' screen with the following information:

- Navigation Bar:** Options, Patrons, Opportunities, Dashboards, C&P Transactions, C&P Recurring, C&P Reports, C&P Import, C&P Virtual Terminal (+).
- Processing Result:** Transaction Result: Transaction processed successfully. Order Number: 1111114920944111. Vault GUID: 3ce458fa-4a79-4908-86ce-d11f8894787.
- Action:** A button labeled 'New Transaction' is visible below the order number.

You can click on the C&P transactions tab to see the transaction listed there.

Options...

ations Patrons Opportunities Dashboards **C&P Transactions** C&P Recurrings C&P Reports C&P Import C&P Virtual Terminal +

C&P Transactions Home

View: Today Transactions Go! Edit | Create New View

**Recent C&P Transactions** New

Order Number	Tracker	Campaign	Organization	Total Charged	Date and Time	Vault GUID
1111114929844111			Sue Higgs	\$100.00	1/11/2011 4:09 AM	3ce468fa-4a79-4908-b6ce-d118894787
1111113750834111			Morgan Tripps	\$45.50	1/10/2011 3:38 PM	aac98fd9-9343-4209-b8ea-0928797a707e
1111103417214111			Kay Fulcher	\$0.50	1/10/2011 2:34 PM	113b04c9-55fa-42cf-ae7b-0de92c264041
111107719334111			Sue Higgs	\$400.00	1/9/2011 9:07 PM	6c559237-c1da-4f71-8b45-a013ca9eb17d
1111054054824111			Michael Tinabaum	\$12.25	1/9/2011 7:41 PM	dd90f51-29c9-47c4-a53b-371cc29d6a7b
111910115354111			Mohammad Taghavi	\$25.00	1/9/2011 12:01 AM	969a2d7c-fc59-47e6-afc3-ca797206c388
11191018654111			Mohammad Taghavi	\$221.00	1/9/2011 12:01 AM	8c61b9e5-3cda-44ea-9faf-dce156e6c147
1117561844924111			Michael Tinabaum	\$50.00	1/7/2011 6:19 AM	0c474137-387b-4975-a652-bcc9897f1047
1117124331894111		CnPTest	John Martin	\$100.00	1/7/2011 2:44 AM	71d9e3b5-7f5e-4852-b113-04fad04471be
111710279204111			John Fulcher	\$300.00	1/7/2011 12:27 AM	a05554aa-a161-4fe-8486-612794967011

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And it will also appear under the C&P recurring tab.

Options...

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C&P Recurrings Home

New: All Go! Edit | Create New View

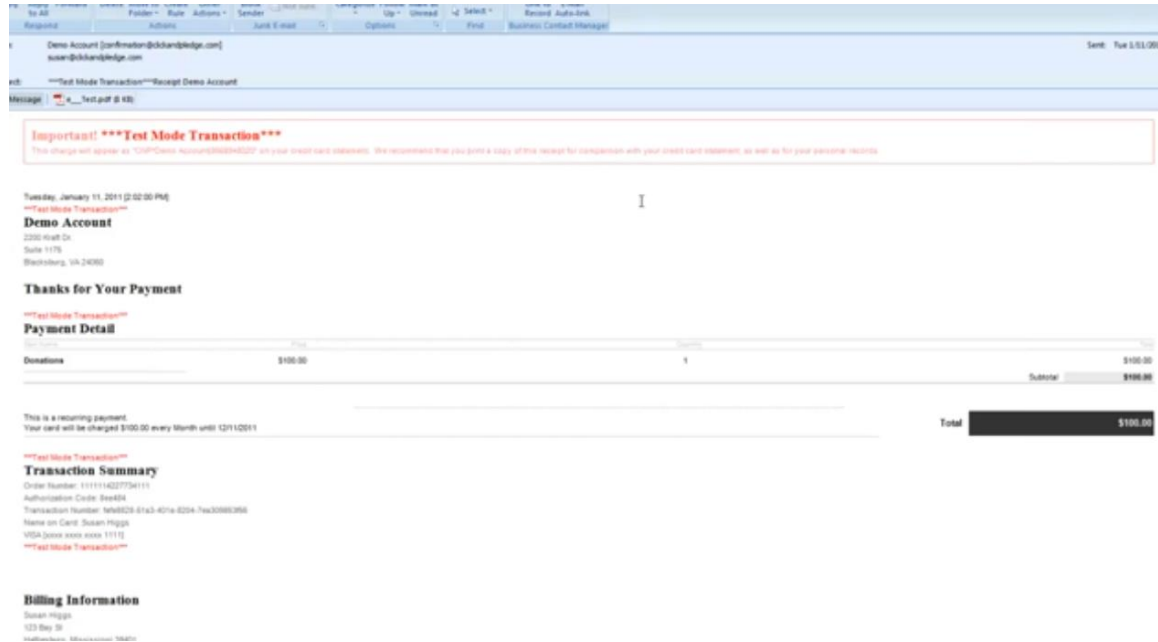
**Recent C&P Recurrings** New

Recurring Id	Date Established	Full Name	Installment Period	# of Installments	Installment(s) Made	Next Installment Date	Installment Amount
12528	1/11/2011	Sue Higgs	Monthly	12	1	2/11/2011	\$100.00 \$1.2
12518	1/11/2011	Kay Fulcher	2 Weeks	5	1	1/25/2011	\$0.50
12130	1/10/2011	Sue Higgs	2 Weeks	100	3	1/24/2011	\$400.00 \$40.0
12314	1/10/2011	Alona Thomas	2 Weeks	12	2	1/24/2011	\$60.00 \$7
12508	1/10/2011	Michael Tinabaum	2 Weeks	8	1	1/24/2011	\$12.25 \$
12507	1/10/2011	Deanna Martin	2 Weeks	10	1	1/24/2011	\$50.00 \$5
12506	1/10/2011	John Martin	Monthly	6	1	2/10/2011	\$25.00 \$1
12083	1/9/2011	Mohammad Taghavi	Monthly	25	2	2/9/2011	\$25.00 \$6
12082	1/9/2011	Mohammad Taghavi	Monthly	6	2	2/9/2011	\$221.00 \$1.3
12479	1/7/2011	Michael Tinabaum	Monthly	12	1	2/7/2011	\$50.00 \$6

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The next screen is a copy of the receipt that the donor will receive.



You have just completed a transaction within the Click and Pledge virtual terminal.