

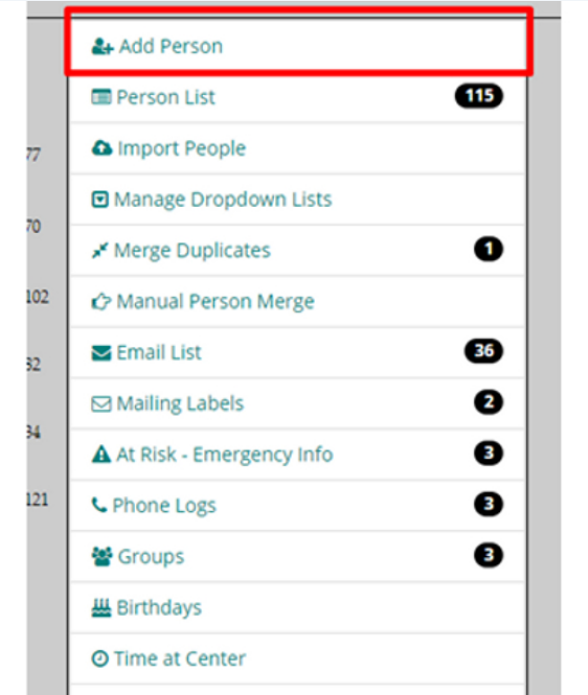
Tracking Donations and Donors



Learn how to track donations in MSC

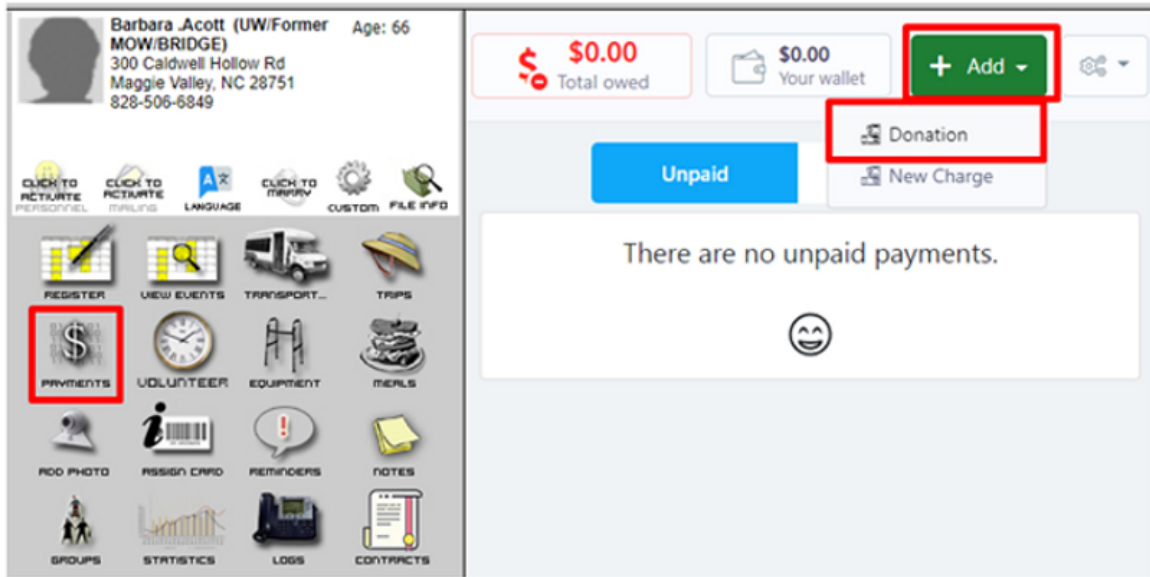
1 Tracking donations in MSC is pretty easy. And it will allow you to run reports to see who's donated and how often.

First off, you must add your donor(s) to MySeniorCenter using the Add Person button in your People Tab Main Menu.



2

To track/add donations, simply go to that person's payments area on their record page. The use the +Add button in green up at the top and select Donation.



3

Next, put in whatever notes you want and select a payment method. Then put the amount they donated in at the bottom next to the "\$" symbol.

more

Notes

In kind donation

Payment Method

Check

Unpaid

Cash

Check

Credit Card

Wallet

4

You can also click on the small More link right above notes (in the above photo). This will allow you to put in the check #, destination of funds, and type of donation information if you want.

Less

Destination Of Funds

Gift Fund

Check Number

#1234

Type

Money

--Select--

Food

Money

Goods (NON-FOOD)

5

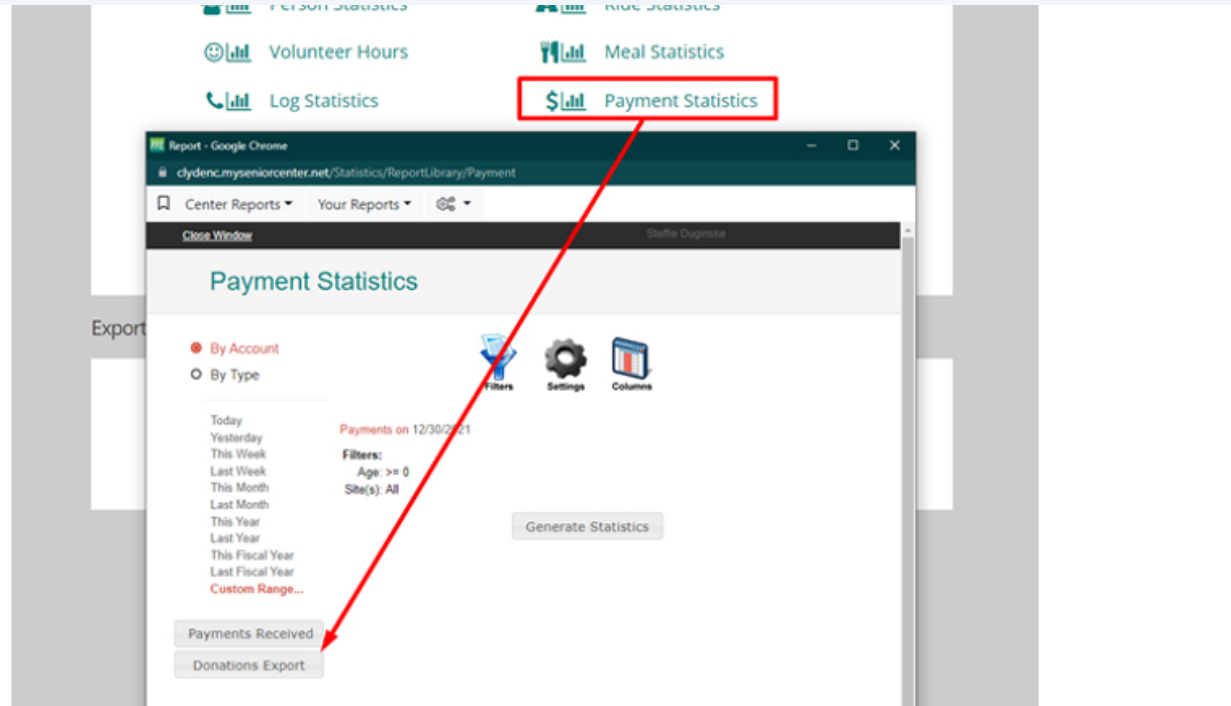
It's likely you will make the Payment Method above as Cash or Check, depending on how they are donating. Then just hit the big green Charge button. This should then take you back to the general payment area window where you'll see the receipt for this donation in their PAID TAB.

The screenshot shows a payment interface with two tabs: 'Unpaid' and 'Paid'. The 'Paid' tab is selected and highlighted in blue. A search icon is visible in the top right corner. Below the tabs, the date '2021^' is displayed. The main content area shows a summary for 'December 29 Wednesday' with '1 Receipts' and a total 'Amount' of '\$100.00'. A list of items follows, including a checked receipt 'Receipt#133' for '1 items' worth '\$100.00', and a checked 'In kind donation' for '\$100.00'. A bottom navigation bar with four icons is partially visible at the bottom of the screen.

Date	Receipts	Amount	Action
December 29 Wednesday	1	\$100.00	
<input checked="" type="checkbox"/> Receipt#133		1 items	\$100.00
<input checked="" type="checkbox"/> Donation: In kind donation			\$100.00

6

This is how you'll mark donations on people's records. The next step is running reports. We actually have a special Donations Export report right in Payment Statistics.



7

When you click on this, you can choose between a regular or detailed donations export report and also put in your date range! Then just click the Export button and it will download to an excel document for you.

Export Donations to Excel

Donations Export Donations Export Detailed

Select Donation Received Date Range

12/29/2021

12/29/2021

Export

And here's your Donations report!

Donation Date	First Name	Last Name	Account Name	Account Number	Address	PO Box	City	State	Zip	Donation	Destination of Funds	Check #	Donation Type	Payment Method
12/29/2021	Barbara	Acott	All Meal Payments	PP	300 Caldwell Hollow Rd		Magpie Valley	NC	28751	100	Gift Fund	#1234	Money	Check