DONOR MAINTENANCE

PAXTON LIVE

This screen allows new donors to be added or existing ones changed or deleted. When added, each donor is given a reference that is automatically generated.

If you wish to book a donation from a person and you are able to claim gift aid then the individuals details must be recorded in this screen for HMRC purposes. A signed gift aid declaration can also be uploaded and attached to the donors details.

Click on Add to add a new donor or Update to change details for an existing donor.

Donor reference	This field will automatically generate the next sequential donor reference.
Name, address, contact etc	Enter the donors details
Send Letter Flag	Set to 'N' if this donor is to be excluded from mailings performed by Group or Head Office. Otherwise set 'Y'.
Gift Aid Flag	Set to 'Y' if this donor has submitted a current Gift Aid declaration. Otherwise set to 'N'. If the flag setting is changed from 'N' to 'Y' then any donations already entered with a date after the 'Gift Aid start date' will be set to Gift Aid'ed and will appear in a future Gift Aid schedule. If the flag setting is changed from 'Y' to 'N', then any donations already entered with a date after the 'Gift Aid cancelled' date that have not been included in a Gift Aid schedule will be unset for Gift Aid.
Gift Aid Start Date	For Gift Aid donors, set the start date of their completed declaration. If the 'Gift Aid start date' is changed then any donations already entered that are effected by the date change that have not been included in a Gift Aid schedule will be set or unset for Gift Aid as appropriate.
Gift Aid Cancelled Date	If Gift Aid no longer applies for this donor then set the cancellation date here.
Gift Aid Declaration File	Upload the file from your computer (refer to the uploading documents instructions). Then click on the button with two dots and select the document you wish to attach. It defaults to a PDF file type so this may need to be changed to 'All files' depending on your file type.
Last Donation Date	This field is automatically maintained by the system as the booked date of the last donation made by this donor and is for information purposes.
Inactive Flag	Set to 'Y' if this donor has become inactive.

Example of the Donor Maintenance screen