

DONOR ENQUIRY



This screen displays the details of the selected donor. If a Gift Aid declaration has been attached in Donor Maintenance then it can be viewed using the 'View Gift Aid declaration' button. The button will only be displayed if a file has been uploaded.

Your first donor will be displayed, use the donor selections to find the relevant person.

- Donor selection** Select the required donor via the 'Donor ref', 'Surname', 'Address' or 'Postcode' listbox. Once the donor is selected their information is displayed on the screen.
- Notes** Displays the notes. Scroll bars allow movement to older details. The action line button changes to 'Update notes' allowing any additional notes to be added. Also, editing of existing notes is permitted including cut, copy and paste.
- S Orders** Lists the standing order details set against this donor
- Totals** Shows the donation turnover totals for the current and previous accounting years, calendar years and tax years.
- Donations** Lists the donation details for this account in reverse chronological sequence. The full details of the donation entry can be viewed by 'double clicking' in the '*' column in the required donation line.

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Donor reference	001	GASDS flag	N	Threshold	N/A
Surname	Brown	Community building flag	N	Sponsorship flag	N
Title	Mrs Initials H	Gift Aid flag	Y	Start date	01/01/23
Forenames	Helen	Last donation date	05/05/23		
Address	10 Church Street Cornwall	Weekly gift flag	N		
Postcode	CN29 0AH	Pledge value		Pledge date	
	View Gift Aid declaration	Inactive flag	N		
		Search field 1			
		Search field 2			

Date	Type*	A/c	Station	Project	Reference	Value*	GA	GA schedule	*
25/07/23	Other	2120	025		Dons 25/07/23	20.00	Y		
15/06/23	Other	2130	025		Don June23	15.00	Y		
05/05/23	Other	2110	025		Dons May23	12.00	Y		

Print Notes S Orders Totals Donations Exit

Example of the Donor Enquiry screen