

Post Payments and Donations

With this quick posting, you can post payment and/or donation information to any activity of any fund for multiple family records. In the Contributions navigation pane, click **Quick Posting > Payment/Donation Entry**.

Important Reminders:

- A fund must have a fund identifier, fund name, and fund period.
- Before you can post information to a fund, it must have at least one group and activity.
- You can use this quick posting to add the fund to a family record, eliminating the need to return to the family's fund before a payment can be posted.
- If a family record hasn't been added, you can add the family during this quick posting.
- With the flexible date feature, you can post entries outside of a fund's date range. So, you can post payments (with the actual date paid) to a pledge drive before it begins or after it ends.
- When you begin the quick posting, a batch number is assigned to the list of entries and posted to each family's Rates/History/Kywrds window.

1. When you click **Payment/Donation Entry**, the Quick Posting Options dialog box displays.
2. Select options for your postings, and click **Use/OK**.
3. In the grid, enter or select the fund and payment information.

Useful Information

- Non-cash donations usually don't have a dollar value. You can enter **0** for the amount, and describe the item in the **Comment** field.
- In the optional **Check # Cash** field, you can enter the check number or payment method (up to 10 characters). For example, if a payment was made with cash, enter "CASH", or if it was paid by credit card, you can enter "MC", "Visa", or any description you want.
- Donors who have had insufficient funds in the past display in pink text. To avoid bank fees, make sure these donors have sufficient funds before posting.

4. To include a payment/donation for another family, click **Insert Line**. Repeat this for each family you want to update. When you're done, click **Save**.

Tip

If you have a large number of entries and need to correct one, click **Filter** to find it.

5. To post, click **Post to Families & Members**. Or, to save the batch and post later, click **Finish Later**.

If you previously created a batch but didn't post, you can return to the existing batch.

1. When you click **Payment/Donation Entry**, the Quick Posting Batches dialog box displays.
2. Select the appropriate batch, and click **Use Existing Batch**.
3. In the grid, enter or select the fund and payment information.

 **Useful Information**

- Non-cash donations usually don't have a dollar value. You can enter **0** for the amount, and describe the item in the **Comment** field.
- In the optional **Check # Cash** field, you can enter the check number or payment method (up to 10 characters). For example, if a payment was made with cash, enter "CASH", or if it was paid by credit card, you can enter "MC", "Visa", or any description you want.
- Donors who have had insufficient funds in the past display in pink text. To avoid bank fees, make sure these donors have sufficient funds before posting.

4. To include a payment/donation for another family, click **Insert Line**. Repeat this for each family you want to update. When you're done, click **Save**.

 **Tip**

If you have a large number of entries and need to correct one, click **Filter** to find it.

5. To post, click **Post to Families & Members**.

Additional Information

Quick Posting Window


This window contains a grid that displays fund payment/donation information for families. The batch number is assigned and posted to the bottom grid of the Rates /History/Keywds window.

Under the family's information above the grid, you have options to add or change rates and keywords, view the family's giving history, or edit family information and view members.

Once you build your batch, you can filter or search the information in the grid.

- **Filter the List** – Use the filter to see only the results you want in the list. Clear the filter to see all the transactions in the batch again.
- **Search in the List** – Use this option to "jump" to a certain transaction. You'll continue to see the entire batch, but your cursor moves to the transaction you're looking for. If multiple transactions match your search, this works like the filter and only shows those results in the list.

To change the option fields for a batch at any time during the quick posting, in the Quick Posting window, click **Options**.

 **Useful Information**

You can resize and reorder the grid columns by clicking the column heading and dragging and dropping it in the new location.

Quick Posting Options

Use this dialog box to select information that you want to repeat automatically for each payment/donation. You can also automatically post check numbers, comments, and attendance for all entries. Additionally, you can [export the totals](#) to PDS Ledger or QuickBooks.

To open this dialog box during the quick posting, in the Quick Posting window, click **Options**.

Quick Posting Batches

If you save your batch and return to the quick posting at a later time, your existing batches display in this dialog box. You can continue the quick posting with an existing batch, create a new batch to use, or delete a batch.

Related Topics

Export Batch Totals
Contribution Quick Posting
Set Up Funds and Contributions