

Gift Batch Entry

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.


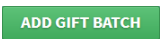
[Here is the new version of this article in the Veracross Community.](#)



Overview

You may wish to create gift records (i.e. donations and/or pledges) in batch, rather than adding them one-by-one using the "Add a Donation/Pledge" links. You should use this process during times where there are many gifts to enter quickly (during a pledge drive, for example) or when you have a number of gifts with similar characteristics (all received on the same date to the same campaign, for example).

Creating a New Gift Batch




To create an entirely new gift batch, follow the steps below.

1. On the **Development** homepage, under the **General** Section, click **+ Add a Gift Batch**. If you don't see this option, speak with your account manager to enable it.
2. Fill in all applicable defaults on the General tab under the **Defaults** header. **Gift Date** is a required field.
3. Click the **Add Record...**  button and, on each line of the gift batch Items grid, enter each gift (i.e. donation and/or pledge) and the necessary fields. *Unless data differs from the defaults set above, you do not need to enter data for these particular fields, as they will be automatically populated.*
4. Click the **Add Gift Batch**  button. *This will show **Update** if you have already clicked **Add Gift Batch**.*
5. All values entered under the **Defaults** header are now automatically filled in to the appropriate fields within the grid. In addition to this:
 - o The **Totals** header displays the # of Gifts, # of Donations, # of Pledges, Total Gifts, Total Donations, and Total Pledges represented by the Gift Batch items.
 - o The **Gift Creation** header displays the # of Uncreated Gifts, # of Uncreated Donations, and # of Uncreated Pledges which are the number of Gift Batch items without corresponding Gift records.

6. Verify that all fields in all Gift Batch items are correct. If you make any changes to any of the Gift Batch items within the grid, click the **Update**  button.
7. When you are ready to create the actual gift records, click on the Action Menu and run the **Create Gift Records from Batch** procedure. When this procedure is run:
 - The **Gifts Created?** field under the **Gift Creation** header will now say  .
 - The **Most Recent Creation Date** will be set with the current date/time.
 - The actual donation and/or pledge records that have been created can now be reviewed and/or modified in the **Gift Records** tab.

Adding Gifts to an Existing Gift Batch

To add more gifts to a gift batch that has already been created, follow the steps below.

1. On the **Development** homepage, under the **General** section, click on the **Find a Gift Batch** query. If you don't see this option, speak with your Account Manager to enable it.
2. Enter criteria to help narrow down your search and click the **Run Query**  button.
3. Click on the link in the **Gift Batch ID** column for the gift batch you are accessing to open up the Gift Batch record.
4. Click the **Add Record...**  button and enter each gift (i.e. donation and/or pledge) and the necessary fields.
5. When all additional gifts are entered, click the **Update**  button to add the new gift batch items to the existing gift batch.
6. After verifying that the information is correct, click on the Action Menu and run the **Create Gift Records from Batch** procedure to create actual gift records.
*You can see if gift records have been created for a gift item by scrolling to the right in the Gift Batch item grid and looking at the **Posted** field. Items with records created will have this checked off.*

Create Gift Records from Batch Procedure

Running this procedure is what creates actual gift records from the gift batch items. Running this procedure multiple times will never create duplicate gift records.
