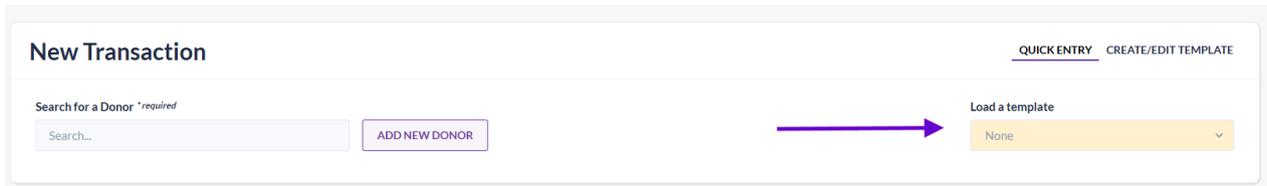


Quick Gift Entry Templates

Last Modified on 05/05/2025 1:36 pm EDT

Quick Gift Entry uses pre-filled fields to speed up the process of recording a gift. Instead of entering each field manually, you can use a quick entry template to pre-populate certain fields and expedite gift entry.

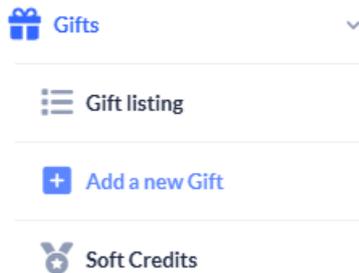
This article details how to create and load a Quick Entry template.



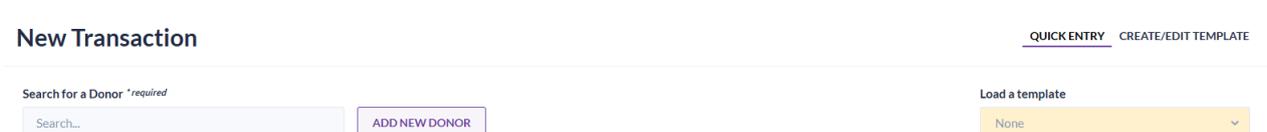
The screenshot shows the 'New Transaction' form. At the top left, there is a search bar labeled 'Search for a Donor *required' with a placeholder 'Search...' and an 'ADD NEW DONOR' button. To the right, there is a 'Load a template' dropdown menu with 'None' selected. A purple arrow points from the search bar area towards the dropdown menu.

Create a Quick Entry Template

First, use your preferred path to add a new gift. You may use the left navigation to head to Gifts > **+ Add a new gift**

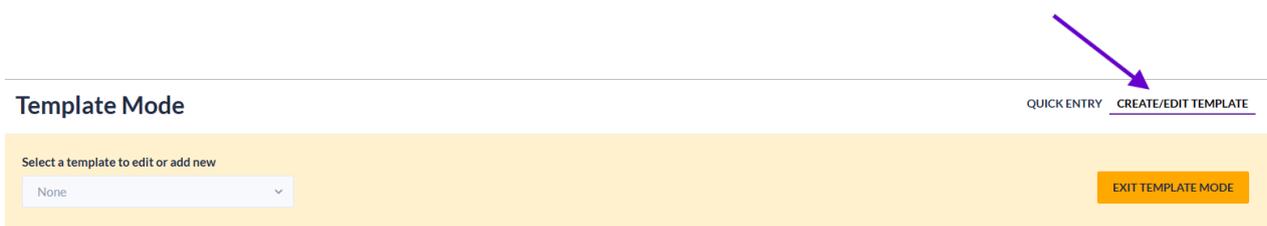


On the right-hand side you will see the **Quick Entry** tab and the Load a template drop down (Skip to "Load a Quick Entry Template" below if you'd like to load a template you've already created).



The screenshot shows the 'New Transaction' form. At the top right, there are two tabs: 'QUICK ENTRY' and 'CREATE/EDIT TEMPLATE'. The 'QUICK ENTRY' tab is selected. Below the tabs, there is a search bar labeled 'Search for a Donor *required' with a placeholder 'Search...' and an 'ADD NEW DONOR' button. To the right, there is a 'Load a template' dropdown menu with 'None' selected.

Select the **Create/Edit Template** tab where you'll be taken to Template Mode.



The screenshot shows the 'Template Mode' form. At the top right, there are two tabs: 'QUICK ENTRY' and 'CREATE/EDIT TEMPLATE'. The 'CREATE/EDIT TEMPLATE' tab is selected. Below the tabs, there is a search bar labeled 'Select a template to edit or add new' with a placeholder 'None' and a dropdown arrow. To the right, there is an 'EXIT TEMPLATE MODE' button. A purple arrow points from the 'CREATE/EDIT TEMPLATE' tab to the 'EXIT TEMPLATE MODE' button.

Template Mode allows you to select an existing template, or create a new one.

Leave "None" selected to create a new template by completing the gift fields below.

Select a template to edit or add new

None

1

Solicitation Method	Campaign	General Ledger
Select Value	Select Value	Select Value
Sub Solicitation	Solicitor	
Select Value	Select Value	

Complete any gift fields that you wish to pre-populate with a defined value. Leave any variable fields blank (e.g. Gift Date and Gift Amount).

1

Solicitation Method	Campaign	General Ledger
Unsolicited	Annual	Unrestricted
Sub Solicitation	Solicitor	
Select Value	Select Value	

2

Gift Date	Gift Amount	<input type="checkbox"/> Make this Gift a Tribute
<input type="text" value="Pick Date"/>	<input type="text" value="\$0.00"/>	
Payment Type	Fair Market Value ?	
Cash	<input type="text" value="\$0.00"/>	
	Tax Deductible Amount ?	
	<input type="text" value="\$0.00"/>	

3

Thank You Method

Email Only

4

There are no custom fields defined for gifts section

5

Notes

Unrestricted Annual Campaign Cash Gift.

Once finished, select **Save Template** at the bottom right.

SAVE TEMPLATE

Finally, give your template a name and hit **Save**.

Name Template

✕ CANCEL

Give your new template a name.

Unrestricted Annual Campaign (Cash Gifts)

SAVE

A success message will appear in the upper right noting the template was created.



Success!

Template created successfully



Select **Exit Template Mode** to navigate back to the Gift Entry screen.

EXIT TEMPLATE MODE

You'll now be able to load your new template by selecting it from the *Load a template* drop down.

Load a Quick Entry Template

First, add or select an existing donor from the New Transaction screen.

New Transaction QUICK ENTRY CREATE/EDIT TEMPLATE

Search for a Donor *required

Search... ADD NEW DONOR

Recently Accessed Contacts

Andrew Supporter 27001 Agoura Rd

Load a template
None

Next, select the **Load a template** drop down and choose the template to load.

Load a template

None

None

Unrestricted Annual Campaign (Cash Gifts)

The pre-defined fields from the selected template should populate. Continue with your **gift entry** like normal.

New Transaction for Andrew Supporter

Search for a Donor ^{required}

Andrew Supporter

ADD NEW DONOR

Load a template

Unrestricted Annual Campaign (Cash GL...

1

Solicitation Method ^{required}

Unsolicited

Campaign

Annual

General Ledger

Unrestricted

Sub Solicitation

Select Value

Solicitor

Select Value

Managing Quick Entry Templates

When in Template Mode, you can edit, delete, or copy any existing templates.

Template Mode

Select a template to edit or add new

None

EXIT TEMPLATE MODE

None

Direct Mail Capital Campaign Cash Gifts.

✕

Campaign

Select Value

General Ledger

Select Value

Scholarship Fund - Board Member

✕

Unrestricted Annual Campaign (Cash Gifts)

✕

Solicitor

Select Value

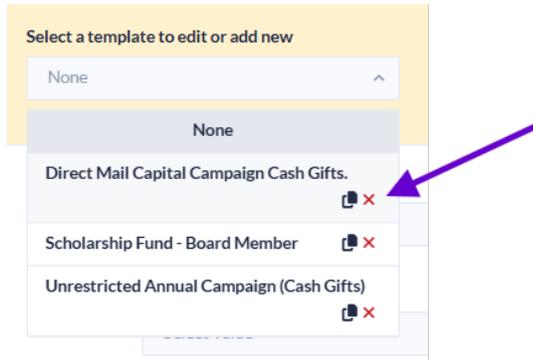
Edit Template

Simply select the template from the drop down and make any desired changes. Select the **Save** action at the bottom right to apply the changes. If no changes were made, the Save button will be greyed-out.

SAVE TEMPLATE

Delete Template

Select the red x to delete a template you no longer need.



Before the template is deleted, you'll be prompted to confirm first.

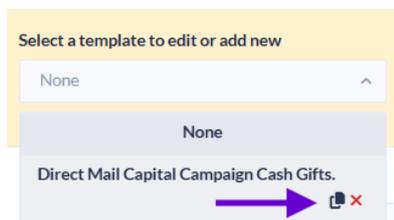
Are you sure you want to delete?

You are about to delete the template "Scholarship Fund - Board Member". This cannot be undone. Are you sure you want to proceed?

NEVER MIND YES, DELETE TEMPLATE

Copy Template

Select the Copy icon to copy a template.



Next, enter a Template Name > **Save**.

Name Template

X CANCEL

You are copying the template "Direct Mail Capital Campaign Cash Gifts. ".
Give your new template a name.

Template Name

SAVE

