Quick Gift Entry Templates

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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.

New Transaction		QUICK	ENTRY CREATE/EDIT TEMPLATE
Search ADD NEW DONOR		Load a template None	~

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

Gifts	~
E Gift listing	
+ Add a new Gift	
Soft Credits	

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).

New Transaction		QUICK ENTRY CREATE/EDIT TEMPLATE
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Select a template to edit or add new		
None 🗸		EXIT TEMPLATE MODE

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	Name Template		× CANCEL
	Give your new template a name.		
	Unrestricted Annual Campaign (Ca	sh Gifts)	
			SAVE
A success message	e will appear in the upper righ	nt noting the templa	ate was created.
		Success! Template created s	successfully
Select Exit Templa	ite Mode to navigate back to	the Gift Entry scree	en.
			EXIT TEMPLATE MODE
You'll now be able down.	to load your new template by	y selecting it from th	ne <i>Load a template</i> drop
Load a Qu	iick Entry Temp	late	
First, add or select	an existing donor from the N	ew Transaction scre	een.
New Transaction			QUICK ENTRY CREATE/EDIT TEMPLATE
Search for a Donor "required Fearch Recently Accessed Contacts Andrew Supporter 270	ADD NEW DONOR		Load a template None
Next, select the Lo	ad a template drop down an	id choose the templ	late to load.

QUICK ENTRY CREATE/EDIT TEMPLATE
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 Tr	ansaction for Andrew Support	QUICK ENTRY CREATE/EDIT TEMPLATE				
Search for a E Andrew Su	Donor 'required ADD NE	WDONOR				Load a template Unrestricted Annual Campaign (Cash Gi >
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				QUIC	KENTRY CREATE/EDIT TEMPLATE
Select a template to edit or add new None None					EXIT TEMPLATE MODE
Direct Mail Capital Campaign Cash Gifts.		Campaign		General Ledger	
Scholarship Fund - Board Member 🛛 🗗 🗙	~	Select Value	~	Select Value	~
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 "So This cannot be undone. Are you sure you	iolarship Fund - Board Member". want to proceed?
NEVER M	ND YES, DELETE TEMPLATE

Copy Template

Select the Copy icon to copy a template.

Select a template to edit or add new				
None	^			
None				
Direct Mail Capital Campaign Cash Gifts.				

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

