



Managing Charitable Donations

MAKE DONATING EASY FOR PATENTS ANY TIME THEY ARE IN THE PARENT PORTAL BY ASSIGNING DONATIONS INCREMENTS AND ASSIGNING TO THE CHARITY OF YOUR CHOICE

Get Set Up to Accept Charitable Donations

- Create a vendor in the store for the charity. Tip: include the EIN# in the vendor # field.
- Create a transaction type for donations.
- Add an Item in the Store for each donation amount. Tip: include the EIN# in the item name so it appears on the donor's receipt.
- Enable donations in the Parent Portal Settings so parents can see the give option (heart icon) when logging into the portal.

Collect Charitable Donations in the Parent Portal

Your organization must be set up to process ePayments and collect payments through the Parent Portal. When a donation is made, immediate payment by credit card or bank draft is required.

- Parents will select from one of the set amounts added to the store for charitable donations.
- The credit authorization window opens for payment. A card or account on file may be used or a credit card may be added.
- The Payment is authorized and a corresponding transaction for Donation will be listed in the family's transaction history.

Option: The family can print their receipt from the Parent Portal or you can print for them using the Print/Email Statement button and selecting the Donation Transaction Type in the date range you choose.

Reporting for Charitable Donations

The reports below will show donation totals so you can send a check directly to your chosen charity.

- Run one of the following reports with the option to 'Show' Charitable Donations where applicable:
 - Paid Fees Summary
 - Revenue Summary Reports
 - Revenue Snapshot Report (QuickBooks Report)
 - Sales Detail Report with the Charity Vendor selected
- Send a total of the amount collected each month to your Charity.

Congratulations!

You have helped families donate to a charitable cause!