

Donations Cheat Sheet

http://www.artsman.com

How to Toggle Between Individual and Company Donations

You have discovered a donation and receipt for an individual should have been made in the individual's company name. In Theatre Manager, you can easily change from individual to their company. Conversely, you can change from corporate to individual by performing the following steps:

**Note: There MUST be a company name in the patron record in order for a donation to become a "corporate" donation.





Donations Cheat Sheet

http://www.artsman.com

tion #35 Detail for Steve Stewart (Patron #83)					5. Close the Receipt detail window. The Rece		
New Save Dupl	dule/Contacts	Tasks Receipts Se	Payment	Original	now un-printed. Cl	ick the Details Details ta	
ipt Date Descript	ion	Receipt Amt	Receipt #	Receipt Printed			
2 2010 Cheque		\$166.67					
12 2010 Cheque		\$166.66		1			
Donation #	35 Detail for	Steve Stewart (Patro	n #83)				
	1 H	b	3	83 🐕	\$ 8		
Help	New Save	Duplicate Revent	Delete	Print Spell	Payment Original		
Details No	tes Pledg	e Schedule/Cont	acts Ta	isks Receipts So	oft Credits Matching Gift Transaction	ons	
Campaign		Annual Corporate	•		Non-Receipt Benefi	t \$0.00	
Date Donated		Oct 12 2010	- 61		Next Contact Date	Sep 12 2011	
Salisitas 1		1		Dava Eastarbarak		Brown Var 2010	
	Solicitor	1		Doug Easterbrook		Program Tear 2010	
Donation (g	Total Payments		500.00	Benefactor		Fiscal Year 2011	
Total			500.00				
WriteOff Amount			\$0.00	0.0000000000			
		Matching Gift	Co	mmission Paid?			
Tax Rec	eipt Name	Steve Stewart					
Program Name		Steve Stewart				*	
	Sort Name	STEWARTSTEVEIII		Receipt Opt	ions One per payment	-	
Tax	Tax Receipt Nar		e Big Blocks				
	rogram Na	me Big Blocks					
		me BIGBLOCKS		-	Receipt Options One per payment		
0 of 3	Sort Na	me BIGBLOCKS		Receipt	options one per payment	1000	
0 of 3	Sort Na	me BIGBLOCKS		Receipt	opuons one per payment	\$ Payment	

lick the Toggle button. The toggle button will appear as

if you are switching from an individual donation, to a

company donation. The toggle button will appear as 블 if you are switching from a company donation, to an individual donation. When you click the toggle button the Tax Receipt Name, Program Name and Sort Name fields will switch to the company/individual name.