6. Check Gifts (Annual Appeal 2026)

How staff record Annual Appeal check donations with the Manual Gift Entry Form, and what the CRM does automatically after each entry.

- Enter a Check Gift
- What Happens After You Submit

Enter a Check Gift

Enter a Check Gift

Use the **Manual Gift Entry Form** to record every Annual Appeal 2026 check donation. You don't need to log in to the CRM to use the form. Open it in any browser:

https://crm.fortadams.org/widget/form/ssJZyqa3ilpRD0ls3tE5

Submit **one form per check**. The screenshots below use a sample donor (Jane Example). Always enter the real donor's information.

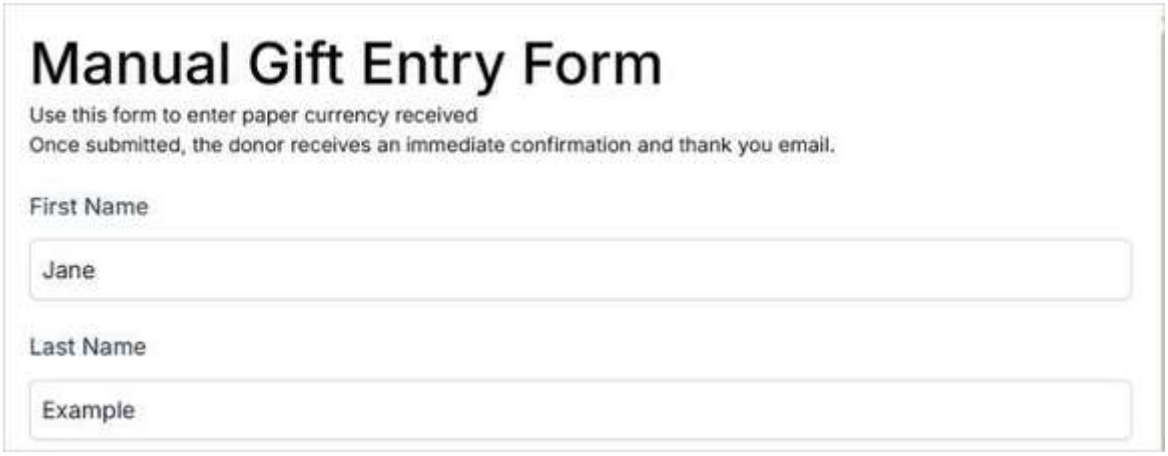
Before you start

Have these ready:

- the check;
- the donor's email address as it already appears on their contact record in the CRM;
- the date the check arrived.

Step 1: Enter the donor's name

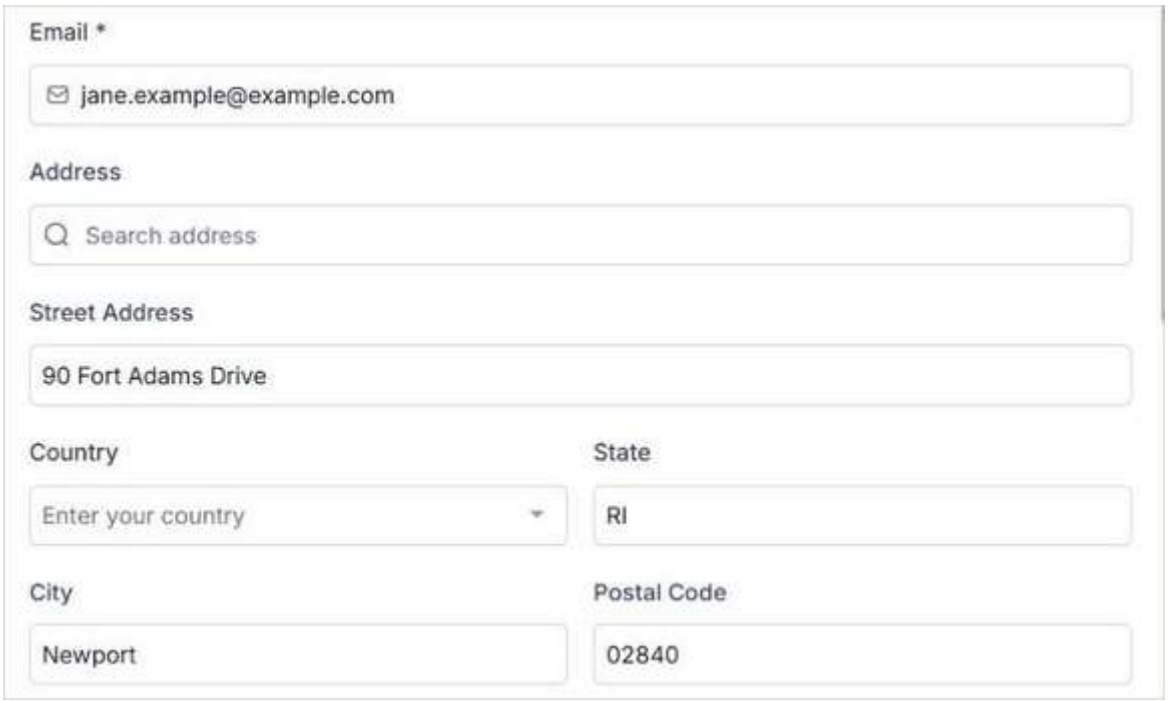
Enter the donor's **First Name** and **Last Name** as they appear on the check. If the check is from a trust or a business, enter the person's name. Phone is optional.



Step 2: Enter the email and address

Email is required. Use the email that is already on the donor's record. The CRM uses the email to find the existing contact, and the thank-you email is sent to that address. A different email creates a duplicate contact.

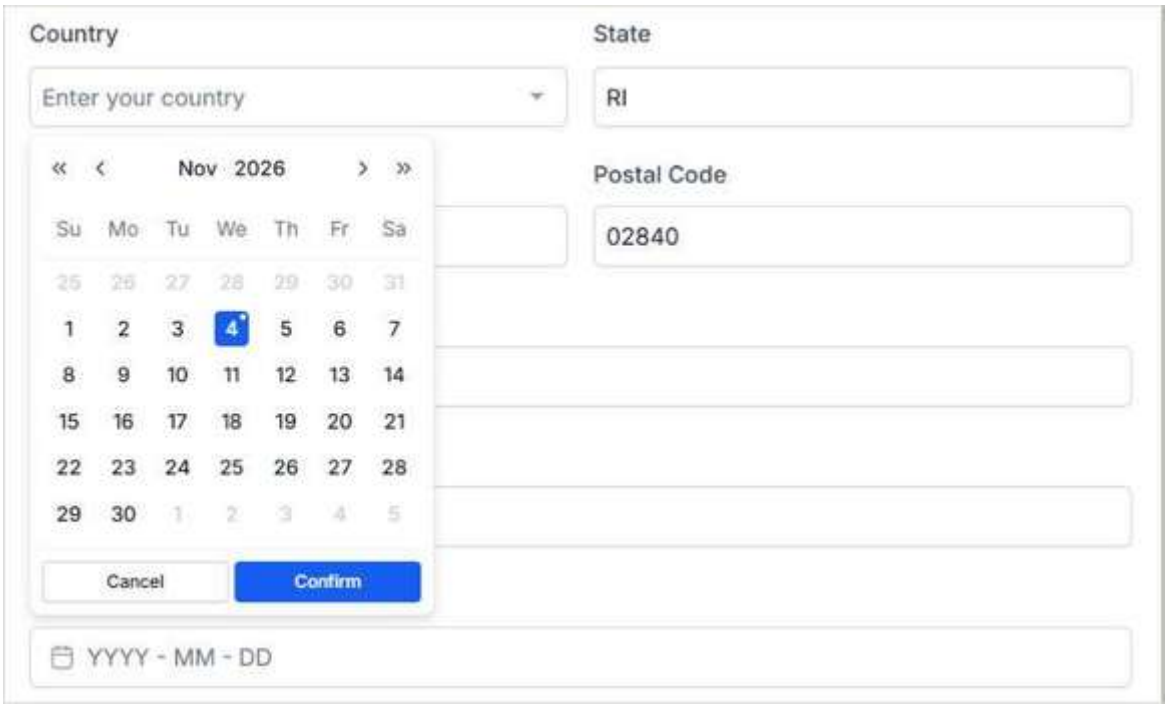
The address is optional. Start typing in the **Address** search box and pick the match, or fill in Street Address, City, State and Postal Code yourself. If the check shows a new address, use the new one.



Step 3: Enter the check details

- **Check Gift Amount** (required): the amount written on the check. Enter numbers only, without a $ sign or commas. Example: **12000.00**.
- **Check Number**: the number printed in the top-right corner of the check.
- **Check Date Received** (required): the date the check **arrived**, not the date written on it. This becomes the gift date in reports.

To set the date, click the **Check Date Received** field, pick the day on the calendar, then click **Confirm**.



Step 4: Check your entry and submit

Check the amount, check number and date against the check, then click **Submit** once.



See **What Happens After You Submit** for what the CRM does next.

Fort Adams staff rules

- **Submit each check only once.** A second submission records the gift twice and sends the donor a second email.
- **Made a mistake?** Don't resubmit. Ask an administrator to correct the gift record in the CRM.
- **No email for the donor?** Email is required. Ask an administrator before entering the gift. Never type a placeholder or someone else's email.
- **Use this form for Annual Appeal checks only.** Online card gifts are logged automatically. Do not submit any other earmarked donations on this form.

What Happens After You Submit

What Happens After You Submit

When you submit the Manual Gift Entry Form, the CRM does all of the following automatically, usually within a minute. You don't need to do anything else.

1. The donor's contact is found or created

The CRM matches the donor by **email**.

- For an existing donor, it updates their name and address from the form.
- For a new donor, it creates a contact.

The check amount is also saved to the contact's **Annual Appeal** field.

2. The gift is logged in the Private Giving pipeline

A gift record (an **opportunity**) is added to the **Private Giving** pipeline at the **Donation Received** stage:

Field	Value

Name	AA 2026 Check: *Donor Name*
Value	The Check Gift Amount
Appeal	Annual Appeal 2026
Gift Method	Check
Gift Date	The Check Date Received
Transaction / Check #	The Check Number

3. The donor gets a thank-you email

The donor receives an email with the subject **"We received your gift - thank you"**. It thanks them by first name, confirms the gift was received by check, and shows a gift summary with the amount, the date received and the check number.

It is a thank-you letter, not an invoice, and it does not ask for payment.

4. The donor is tagged

The tag **annual-appeal-2026** is added to the contact. This puts the donor in Annual Appeal donor lists and follow-ups.

5. The gift shows on the Annual Appeal 2026 dashboard

Open the **Annual Appeal 2026 dashboard** (you need to be logged in to the CRM). You can also go to **Dashboard** and choose **Annual Appeal 2026**. The new gift is counted in:

- **Total Raised**: all Annual Appeal gifts;
- **Check Gifts**: check gifts only;
- **Card Gifts**: online card gifts only;
- **Number of Gifts**: how many gifts;
- **Average Gift**: total divided by number of gifts.

Gift amounts on the dashboard don't include online processing fees.

Double-check an entry

1. Go to **Opportunities**.
2. Choose the **Private Giving** pipeline.
3. In the **Donation Received** column, find **AA 2026 Check: *Donor Name***.
4. Click it to see the amount, gift date and check number.

Fort Adams staff rule

If a gift record is wrong, don't submit the form again. Ask an administrator to correct the existing record.