What Happens After You Submit

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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.

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