How to record a donation

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Steps

1. Open the donor's contact or organization record, **or** go directly to the **Donations** section.
2. Click **Add Donation** or **New Donation**.
3. Select the related campaign (strongly recommended for reporting).
4. Enter the details:
    - Donation amount
    - Date received
    - Payment method (check, credit card, cash, stock, etc.)
    - Check number or transaction reference if applicable
    - Any notes or soft credit information
5. Save the record.

HelpOne will typically update the related campaign totals automatically.

Acknowledgments

Many organizations flag donations for acknowledgment at the time of entry. See the separate article "How to send a donation acknowledgment" for next steps.

Tip: Double-check the donor and campaign before saving -- corrections are possible later but cleaner data at entry saves time.