**RODMAN RIDE FOR KIDS**
**Donor Drive Offline Gift Entry Guidelines**

As we mentioned in our kick-off meeting, Rodman for Kids is building out a CRM on Sales Force. As we've worked with our consultants on data transformation, we saw a lot of inconsistencies in how offline gifts are entered in Donor Drive. Please adhere to the guidelines below to ensure your data is accurately tracked and accounted for in our system.

---

- Reminder: there are two different types of donor records you can create in DonorDrive: "Individual" and "Organization." Make sure you are selecting the correct record type based on the donor. (i.e. If the check is from a company, business, or foundation, choose "organization" as the type. If it is from an individual, couple or family, choose "Individual.")

- If the donor is an Organization and there is no contact name associated, populate First Name and Last Name with "n/a". Do NOT populate the organization name in the first name and last name fields; the Company field is used to store the organization name info.

- If the donor is an Individual, do not populate the Company field with an organization name. use the Matching Company field (if applicable) or Internal Notes to track the individual's related company if relevant. (i.e. Bob Smith makes a donation and you want to make a note that he works for State Street. You would not enter State Street in the Company field.)

- When your organization or donors are collecting groups of donations from a specific offline fundraising event like a Bake Sale or 5k, do not enter the name of those fundraising events as the First or Last Name or the Company field. Instead, use the "Internal Notes" field. When entering these kinds of donations, if donors are known, create individual or organization records for them, as applicable, and populate First Name, Last Name and Company as outlined above. If the donors are NOT known, enter the donations as one or more anonymous donations - populating the First Name and Last Name as "Anonymous".