When a DAR employee wishes to load Gifts that give hard credit to one record and additional credit to other ‘unrelated’ records, such as a Clemson Club and Clemson club members.

1. Retrieve template file ‘\_Revenue\_transaction\_batch\_offline\_entry )Graduation Template.xlsx’
2. Fill out Spreadsheet using guidelines below.
   1. Do not change the name of any column headings
   2. Do not add column headings
      1. If another column is needed contact the DARHelpDesk for assistance
   3. Use table below for Column Data needs.
      1. Columns that are not required can be left Blank if not needed by submitter
      2. If you want a spouse to receive credit their data must be entered as recipient 2
3. Verify all data in spreadsheet
   1. All amounts in a single row of the sheet should match
   2. Designations and Appeals should already be in CADENCE and active
4. Submit file to Gift\_Management-L@clemson.edu for review
   1. Gift Management may require changes or confirmation of information in spreadsheet
5. Gift Management submits to DarHelpDesk
6. Revenue Batch is created, and Gift Management is informed to process the Batch.

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| --- | --- | --- |
| Column Name | Note | Example |
| Lookup ID for Donor credit | Required | T451683 |
| Donor Credit | Required | Donor (hard credit) |
| Name for Donor credit | Not Required, Used for Validation by Submitter/Gift Management | Baltimore/Washington DC Club |
| Lookup ID for Recognition credit recipient 1 | Required | T208931 |
| Name for Recognition credit recipient 1 | Not Required, Used for Validation by Submitter/Gift Management | Peter T. Barry |
| Recognition credit type for recipient 1 | Required | Third Party |
| Recognition Date 1 | Required | 3/1/2020 |
| Recongition Amount 1 | Required | 6 |
| Lookup ID for Recognition credit recipient 2 | For Spouse to be credited, if needed all are required |  |
| Name for Recognition credit recipient 2 | Not Required, Used for Validation by Submitter/Gift Management |  |
| Recognition credit type for recipient 2 | For Spouse to be credited, if needed all are required |  |
| Recognition Date 2 | For Spouse to be credited, if needed all are required |  |
| Recongition Amount 2 | For Spouse to be credited, if needed all are required |  |
| Revenue type | Required | Payment |
| Application (default value to Donation) | Required | Donation |
| Revenue category | Required | Cash |
| Date (MM/DD/YYYY) | Required | 3/1/2020 |
| Deposit Date | Required | 3/1/2020 |
| Credit Card Terminal | Not Required |  |
| Amount (e.g. 10.99) | Required | 6 |
| Receipt amount (e.g. 10.99) | Required | 6 |
| Designation 1 (lookup ID) | Required, Must be set up ahead of time | B0004 |
| Designation 1 amount | Required | 6 |
| Inbound channel | Not Required |  |
| Appeal name | Required, Must be set up ahead of time | 20IBLTARBG |
| Given anonymously | Not Required |  |
| Do not acknowledge | Required | 1 |
| Do not receipt | Required | 1 |
| Reference | Not Required |  |
| Payment method | Required | Check |
| Mark gift as receipted | Not Required |  |