



**Lane Services LLC**  
*not-for-profit technology solutions*

## Enter and track gift demographics

Many larger not-for-profit organizations employ a business model requiring extensive database segmentation and complex gift tracking. iMIS Fundraising provides a foundation but does not include the ability to enter and track gift demographics, including requesting multiple premiums and splitting a gift among multiple campaigns or appeals. Lane Services created a custom gift entry screen to provide this functionality.

## We make it easy!

On one screen, the user may update the donor's basic name & address information, as well as enter information pertaining to the specific gift or pledge. Data elements tracked (others may be added) include:

- Source Code, Purpose Code (Campaign), or Key Code (Appeal)
- Premium(s) requested
- Amount
- Recurring Pledge Amount
- Club code, Letter code, Label code
- Comments
- Special Interests

The screenshot displays a web-based form titled "Gift entry screen". At the top, there are search fields for "Search by ID", "Match Code", "Name", and "Company", along with an "Advanced Search" button. Below this is a header bar with the text "ID 327342563 Full Name LANE, ROBERT Last Updated 07/16/2017 Sect Code C".

The main form is divided into several sections:

- Donor Information:** Includes fields for Member Type (Individual), Gender (M), No Title (M), Sect (Catholic), Prefix (Robert), First Name (Robert), Middle Name (L), Last Name (Lane), Suffix (PH.D.), Designation (PH.D.), Promo Code (M), Services (35.DY.M.NO.PY), Company (1911553ZLANE), Match Code (M), Request (M), Address Type (Home), Address 1 (9632 Wising Sun Ave), Address 2 (Apt), City (Philadelphia), State (PA), and Zip (19115-3008). There is an "Update" button at the bottom right of this section.
- Gift/Pledge Information:** Includes fields for Batch Number (180702-10 \* SM WHITE MAIL 07/02/2018-DATAENTRY), Total Count (8), Total Amount (\$214.00), Sect (C), Purpose Code, Amount (Numbers only), Key Code, Trans Date (mm/dd/yyyy), Source Code, # of Masses (Numbers only), Qty (Numbers only), Material, Letter, P.S. Code, Label Code, Missionary, Comments, Notes, Pledge ID, Pledge Amount, Pledge date, Frequency, Payment Type, Check/CC#, Exp Date Month (01), Exp Date Year (2018), CC Holder, CSV Number, and CC Type. There is a "Save" button at the bottom right of this section.