

# How An Admin Can Review Donation Requests

## Select to Review Donation Requests

To review donation requests, you may either click on "Donations" from the drop-down menu below "Administration",

Or you can click on "Click Here" from the welcome banner.



## Search Donation Requests

Here you can filter down to see which requests are:

- New
- Denied
- Ready for Payment
- Paid

After clicking on the status, make sure to click on "Search".

\*Some companies may have additional statuses for their requests.

PROFITS4PURPOSE

Simple. Relational. Innovative.

Home My Details Administration Logout ? FAQs

Manage Public Donation Requests

Requests Donations Setup

Search Add Request

Status

☐ Use the current request

Start date (e.g. 07/18/2011)

End date (e.g. 07/18/2011)

Additional Conditions

+ Add new condition

Search

## View Donation Request Detail

Click on the donation request to view the detail and to update it's status.

Status

New

☐ Use the current reporting year

Start date

(e.g. 07/18/2011)

End date

(e.g. 07/18/2011)

Additional Conditions

+ Add new condition

Search

Donation Requests

Export to: 

CSV

Mail Merge

ID	NON-PROFIT	SUBMITTED	NEEDED	STATUS	
<input type="checkbox"/>	31022	Rady Children's Hospital	Jan. 16, 2013	Sep. 06, 2014	New
<input type="checkbox"/>	31023	Boys and Girls Club	Jan. 25, 2013	Jan. 01, 1970	New
<input type="checkbox"/>	45499	2013 American Cancer Society / Relay for Life Team Kent State	Sep. 17, 2013	-	New
<input type="checkbox"/>	45500	2013 Relay for Life Bradford County	Sep. 17, 2013	-	New

Go to: 1

Show rows: 100

1-4 of 4

## Review Donation Request and Update Status

From here you can view the detail of the donation request. If you would like to change the status of the request, once approved or denied, click on the below field.

And then click on "Save Changes".

Close

ID

NON-PROFIT ▲

SUBMITTED ▲

NEEDED ▲

STATUS

First Name:

Call

Last Name:

MKTG

Email:

ryan@profits4purpose.com

Status:

Ready for Payment ▼

Last Status

06/03/2013

SUBMITTED:

01/16/2013

NEEDED:

09/06/2014

Description:

We volunteered at the event across the street.

Delete This Request

✓ Save Changes

✕ Cancel

Export to:

Recipient Info

Notes

Additional Info

Donated Items

Mail Merge

Non-Profit

Rady Children's Hospital

View this non-profit's donation history

Can't find your non-profit [Click here](#) to add a new one.

Contact

Luke Harmon

First Name

Luke

Last Name

Harmon

EMAIL

luke@profits4purpose.com

Phone

2532241872

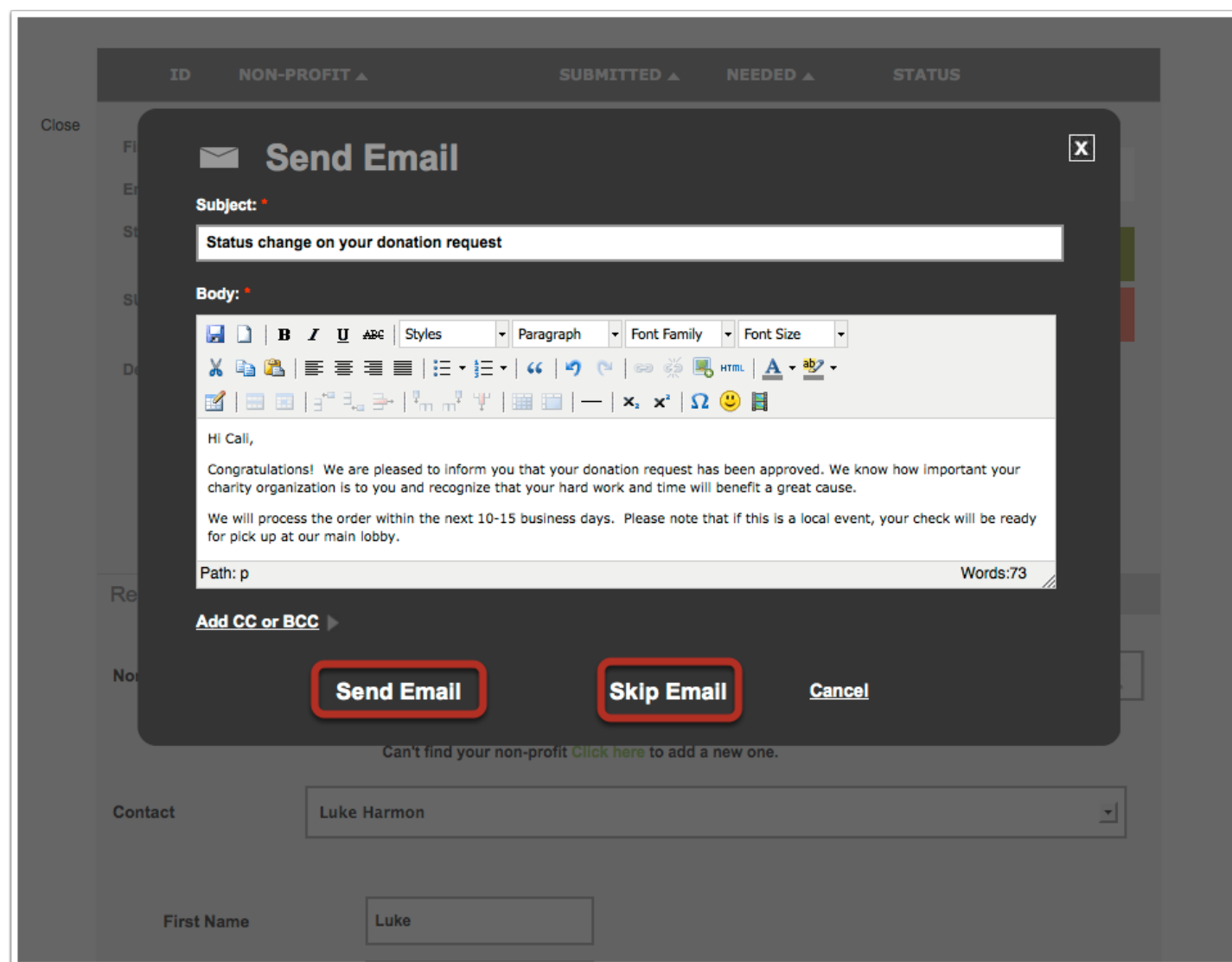
Street Address 1

433 South Sunset Court

### Review Mail Merge After Making Status Change

After changing the status of the donation request, a mail merge will automatically be created. You have the ability to change the email as you wish. Once it looks just as you would like, click on "Send Email".

If you do not want the requestor to be notified of the status change, select "Skip Email".



The screenshot shows a 'Send Email' modal window overlaid on a table of donation requests. The modal has a dark header with an envelope icon and the title 'Send Email'. Below the header, there is a 'Subject:' field with the text 'Status change on your donation request'. The 'Body:' section contains a rich text editor with various formatting tools (bold, italic, underline, text color, background color, link, unlink, list, indent, outdent, link, unlink, image, video, audio, embed, code, table, table of contents, undo, redo, reset, help) and a preview of the email content. The preview text reads: 'Hi Call, Congratulations! We are pleased to inform you that your donation request has been approved. We know how important your charity organization is to you and recognize that your hard work and time will benefit a great cause. We will process the order within the next 10-15 business days. Please note that if this is a local event, your check will be ready for pick up at our main lobby.' Below the preview, there is a 'Path: p' field and a 'Words:73' counter. At the bottom of the modal, there are three buttons: 'Send Email', 'Skip Email', and 'Cancel'. The 'Send Email' and 'Skip Email' buttons are highlighted with red rectangles. The background table shows columns for 'ID', 'NON-PROFIT', 'SUBMITTED', 'NEEDED', and 'STATUS'. The 'Contact' field is set to 'Luke Harmon' and the 'First Name' field is set to 'Luke'.

## Export Donation Requests


If you would like to export your donation requests, click on the "CSV", Excel, or Adobe file icon.


[Search](#) [Add Request](#)

Status 

New

☐ Use the current reporting year

Start date  (e.g. 07/18/2011)




End date  (e.g. 07/18/2011)

Additional Conditions

+ Add new condition

[Search](#)

Donation Requests ▼

Export to:    [Mail Merge](#)

	ID	NON-PROFIT ▲	SUBMITTED ▲	NEEDED ▲	STATUS
<input type="checkbox"/>	31023	Boys and Girls Club	Jan. 25, 2013	Jan. 01, 1970	New
<input type="checkbox"/>	45499	2013 American Cancer Society / Relay for Life Team Kent State	Sep. 17, 2013	-	New
<input type="checkbox"/>	45500	2013 Relay for Life Bradford County	Sep. 17, 2013	-	New

Go to: 

1

 Show rows: 

100

 1-3 of 3 