Theatre Manager>Donations>Matching Gifts

A Matching gift, or donation is a gift or donation made by a matching donor – usually a company– but can be an individual, under the provision that the original donor first makes a gift. In this example and in the screencast, Boundary Credit Union's Matching Gift Coordinator is set up in Theatre Manager. Marlene Smith them makes a donation that is matched. And the Donor Program Report is run.

Part 1 Setting up Matching Gifts

|	
(Match tab screenshot showing: Credit Card, Household, Match, •Contact Info, •Address, Web, Patron)	1. Open the Patron record for the Patron who will be matching the gift. In this example, it will be Chris Ball. 2. Click on the **Match** [Match] tab in the Patron Data portion of the window (Top right).
•Match This data should be filled out for only matching gift coordinators working for a matching gift company. It allows you to find and associate matching gifts to the payee as only these contacts appear in the search list. Enter the ratio that the company matches with. If there is a minimum required for the match to be considered, then please enter that. If there is a maximum amount that the company matches to, enter that to limit the matching gift during entry. Leave either blank if there is no lower or upper limits. ☐ Matching gift company Match gift ratio 100.00% Minimum amount [minimum match] amount of gift before company matches Maximum amount [maximum match] maximum amount the company will match	3. Check the Matching Gift Company gift box. ☑ Matching gift company The checkbox must be enabled if the Patron is to be used as a Matching Gift Company.
Match gift ratio 100.00%	4. Enter the Matching gift ratio. The Matching Gift Ratio is the amount the Matching Gift Patron will match. For example: If I donated $250.00 and the ratio is 100%, the matching gift would be $250.00 If the Ratio is 33% The matching gift would be $82.50
Minimum amount [minimum match] amount of gift before company matches Maximum amount [maximum match] maximum amount the company will match	5. In addition, any minimums and maximums can be indicated. 6. When complete, click the **Save** [Save] button in the Theatre Manager ribbon bar.

Part 2a Making the Donation, Adding the Matching Gift
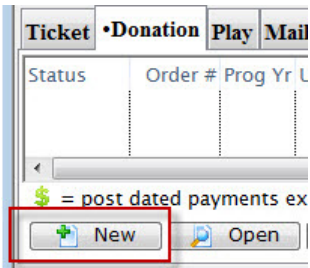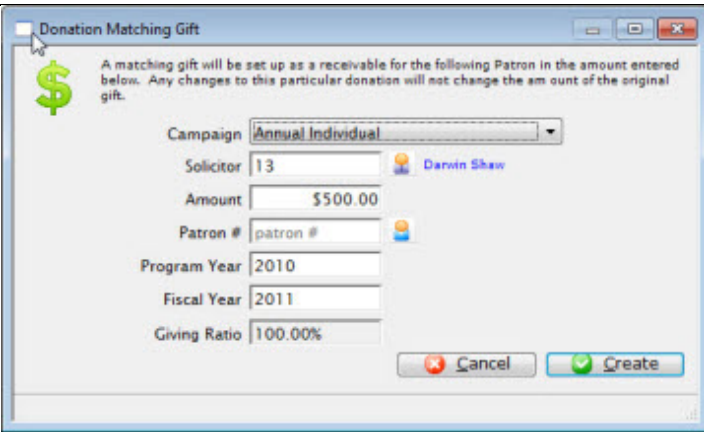
|	
	Open the Patron record for the Patron who will be making the Donation. In this example, it will be Marlene Smith.
	7. Click on the **Donation** **Donation** Tab.
	8. Click the **New** **New** button.
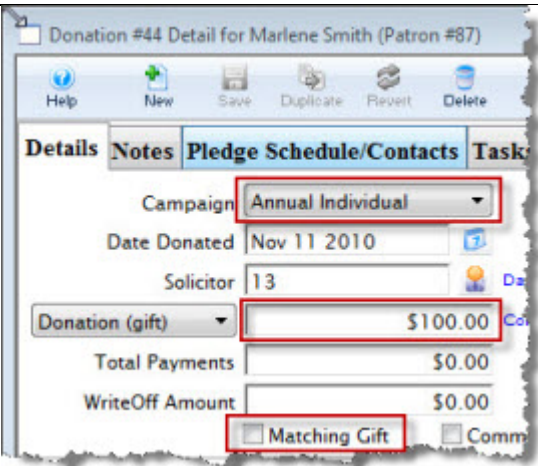
	9. Enter the Donation Campaign
	10. The Donation Amount and
	11. Enable the Matching Gift check box. The Donation Matching Gift Window opens.

|	
	12. To find the **Matching Gift Patron**, Click the patron button next to the ID field.
	Patron # patron #
	13. Search the contact list to find the Patron. Single click to select them.
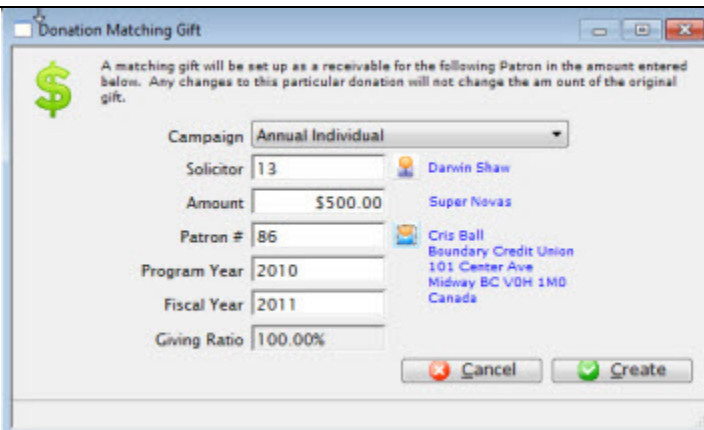
|	
	By default, Theatre Manager assumes the matching gift to be the same as the donation. If the ratio has been modified under the Donor tab of the Matching Gift Patron, the ratio is calculated and inserted in the matching gift detail.
	The Matching Gift can be more, equal to, or less than the amount of the current donation.
	14. Review the amount and click the **Create**
	Create button
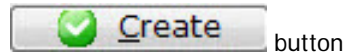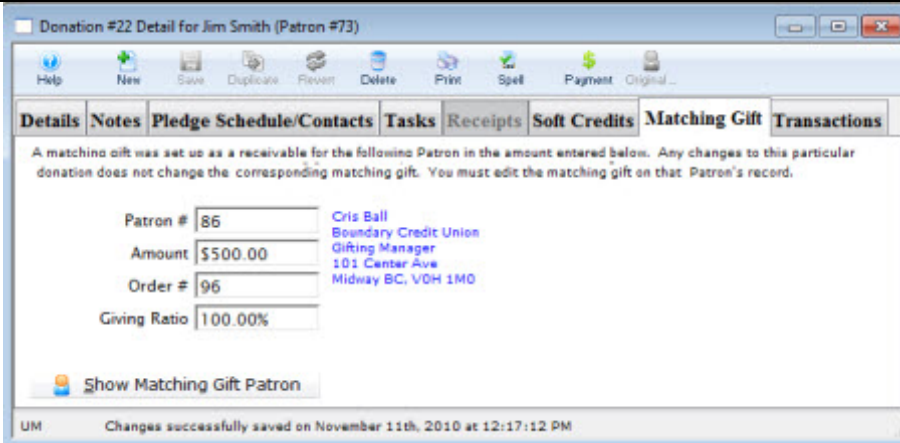
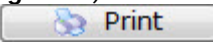Once the payment transaction has been completed, the Donation Detail window will return.

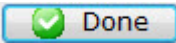To view details, click the **Matching Gift**

Matching Gift tab.

15. Return to the Details tab and click

the **Payment** $ Payment
to PAY for the donation.

Part 2 b Running the Donations Report & Receipts>Donor Program
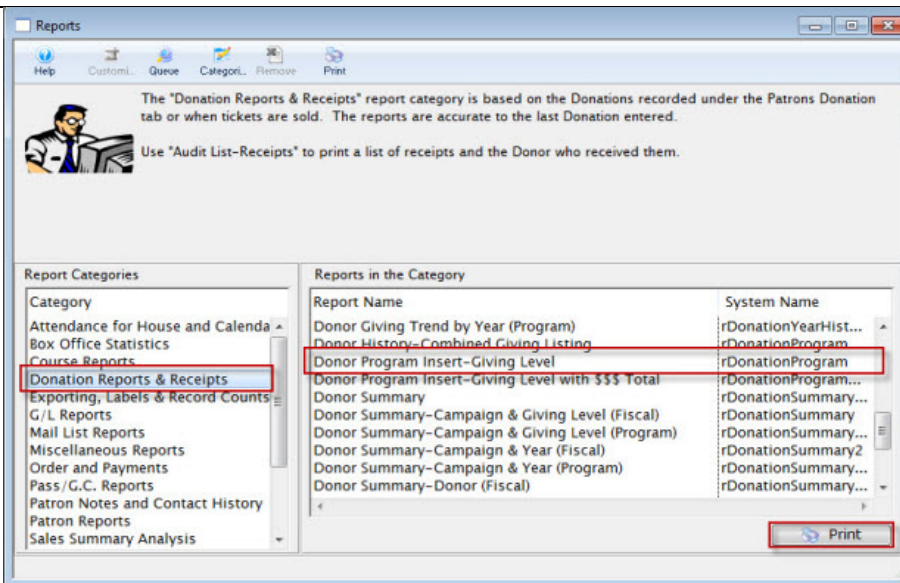
16. Click the **Reports** Reports button in the Theatre Manager Ribbon bar. The Reports Dialog Opens.
17. Select the Category **Donation Reports & Receipts.**
18. Then select **Donor Program Insert** Reports (either one, in this example we are using **Giving Level**)
19. Click the Print Print button.

`

20. Enable the **Add Matching gift** amount to patron's recognition when calculating their giving level
21. **Enable Combine each donation** into a single giving level matrix based on patron number
22. In the sub-selections, choose **Corporate Donation reports.**
23. Click the **Done** report
24. button.