

## Gifts via the Office Phone (66021)

You will need

- PDQ/PCI DSS compliance training
- Knowledge of how to put a gift on RE manually
- Knowledge of how to generate and add a letter as an action

### 1. Identify the person

- a. Take the person's constituent ID (if they have it) or find their record on RE using their postcode – it's likely they are calling after receiving a postal ask, so their postcode *\*should\** be up to date.
- b. *Perform an identity check: ask address and DOB*

### 2. Process donation using PDQ machine

- a. Input the donation amount into the machine and **press green**
  - b. Enter the card number and **press green**
  - c. Enter the card expiry date
  - d. Card holder present = 'no'
  - e. Customer address: only need to enter the house number and then green button (if no house number just press green)
  - f. Postcode: just the numbers and press 'accept'
  - g. Print a merchant receipt
3. Ask if they would like a receipt (email or post). If they do want a receipt, opt to print a customer copy when the PDQ machine asks the question.
  4. Ask if we can claim gift aid on their donation – they must have paid enough tax to cover the amount we would claim (25% of the gift amount).

*...an explanation that the donor needs to pay the same amount or more of UK Income Tax and/or Capital Gains Tax as all charities and CASCs will claim on the donor's gifts in a tax year and that the donor is responsible to pay any difference....*

5. If we can claim gift aid, check if they have a declaration on their record. If they do not, we **must** send confirmation of a verbal gift aid declaration and add the gift aid declaration to their record on RE.
6. Ask which cause/fund they want the donation to go to.

## 7. Put the gift onto RE

- Go to the gift tab → 'new gift' in the top left
- Complete all relevant details (the fields boxed in red are to be completed)

The appeal is always Misc

This is found on the receipt

- Go to the attributes tab → complete the category and description as below

Category	Description	Short Desc.	Date
Gift Source	Telephone - Office		

- Add the Gift Aid declaration if you have taken a new verbal one.

9. Print out the annual fund credit card transactions sheet, write on the date and staple the merchant receipt to the sheet.

[I:\Development Services\Gift Processing\Gift Processing Procedures\1Katie USER GUIDES\ANNUAL FUND CREDIT CARD TRANSACTIONS.docx](#)

10. File the credit card transaction sheet in the black folder.
11. If the gift is less than £500, generate the appropriate letter and add as an action
  - a. If the donor wants an email do x
  - b. If the gift is £500 or over, email [Tom.Howorth@manchester.ac.uk](mailto:Tom.Howorth@manchester.ac.uk) with the ID and he will thank the donor