



Salesforce Donation Overview

Purpose: Provide very basic instructions for volunteers to accurately and completely input different types of commonly encountered donations.

Overview

In the new Salesforce nonprofit template, ‘Donations’ of all types are always associated with an Account. This is a change for organizations previously using the old Salesforce nonprofit template. In addition, the donation categories still exist, but they have been reorganized in the new template.

In order to reduce errors, create the appropriate contact links for each donation, and simplify entry procedures, it is highly recommended that all donations be entered via the account record for both household and organization accounts. Once a donation record has been saved, edit the ‘Contact Roles’ to be certain any and all contacts receive credit for their role in the donation.

A ‘Membership’ donation record offers additional fields such as membership length and start dates. ‘Grants’ also have some unique fields. All donations can be recognized in stages until the donation is received. It is possible to give credit for one donation to several contacts with a variety of roles.

Any ‘Recurring Donations and Pledges’ should be created using that button within the account record rather via the ‘Donations’ button. Recurring Donations and Pledges are then shown with the other account donations. As they are received, the existing donation record is edited rather than entering a new donation.

If your organization uses the ‘Campaigns and Events’ features, donations should be linked to a ‘Campaign’ or ‘Event’. The ‘Campaign and Event History’ should be updated for the related contacts. **Note-accounts do not have Campaign or Event History; this information is only available at the contact level.**

Donations from an Organization should always be entered through the account. Those donations will appear under the Organization and will only appear in the Donation detail for Contacts who have been assigned a specific role for that donation. Organization donations will appear in the ‘roll-up’ fields for each of their Contacts, but not for their ‘Affiliated Contacts’.

For many small non-profit organizations, the majority of donations come in by mail. But donations may come in other forms: via email notification, via wire transfer (often for grants), via a message from another volunteer or Board member. To make the most of your Salesforce database as a resource for future fundraising and communications with your supporters, it is important to capture all types of donations within your database. In a volunteer run non-profit, it may be appropriate to consider whether several volunteers should each enter a different type of donation or whether one person should enter all types of donations.

Search instructions to determine if a donation comes from a new organization or household are included in this tipsheet. The new non-profit template offers options to create the Contact and proceed immediately to recording a donation or membership. If the new account is a multi-contact account, you will want to save that donation record, add the additional contacts from within the account record and then edit the donation record to be sure all contacts receive credit for the donation. Using the sidebar will save entry time.





It is important to enter a donation completely and to have an understanding of the types of donations your organization will receive. If you encounter donations that do not fit a familiar pattern, be sure to consult your admin or volunteer advisor. It can be more difficult to correct entries in this area than to hold an entry until your questions are resolved.

The automatic donation names can be manually edited. This does not save time, but there may be times when your organization chooses to use this option. For instance around yearend, the date in the donation could be edited to be the same as the check date rather than the data entry date. Perhaps you are entering older donations to improve your database and want the donation title to reflect this. Perhaps adding an extra word into the automatic title for memorial gifts is helpful in highlighting or reporting by your organization. Always check with your admin or volunteer advisor to see your organization has some customary donation name editing practices.

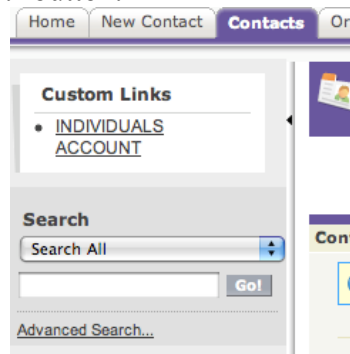
In general, the goal is to enter donations promptly so that donations can be acknowledged quickly. If your organization uses preprinted thank you notes for its campaigns. It is possible that donation entry to Salesforce may occur after gift acknowledgment. But otherwise, Salesforce records may be used to either assign a 'Task' to create acknowledgments or to generate reports that are used to create gift acknowledgements.

Finally, your organization's treasurer or bookkeeper will want to periodically reconcile the gift totals within Salesforce to the organization financial records. This practice is critical to achieving accuracy within your Salesforce database. Be sure to enter donations prior to any scheduled reconciliation.





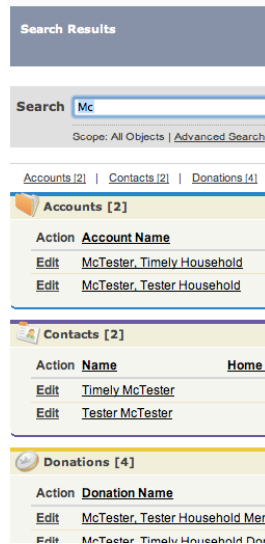
1. **First, ‘Recurring Donations and Pledges’ are entered using a different procedure. Any ‘Recurring Donations and Pledges’ should be created using the button within that section of the Account record rather via the ‘Donations’ button.** Recurring Donations and Pledges are then shown with the other account donations. As they are received, the existing donation record is edited rather than entering a new donation. This is a less common type of donation, but entry is otherwise very straightforward, so no tipsheet has been written for this topic.
2. **Before you can enter any donation, you must determine the correct name of the Account associated with the Donation.** Whether you are viewing a check or both a check and remittance form, you need to determine whether the donor is already in your database. This can be tricky when couples have different surnames names, a handwritten form is only partially legible or donations come in with just an email address. If you have questions, be sure to clarify the donor name with your volunteer advisor.
3. There are several ways to search for an Account record by name. Search in the order given below to save time and search completely across the database.
4. First, try typing the last name of the donor into the blank box of the Search field on the upper left hand side of your screen. Click on the ‘Go!’ button.



A partial last name or even a first name, especially if it is unusual can be used to locate the contact record. Note that the software has been left at the default ‘Search All’ selection. This option will search for all types of records associated with this name including the Account record. The default saves time and pulls up many possible associations for a name that can be helpful if you are having trouble locating the correct Account record.

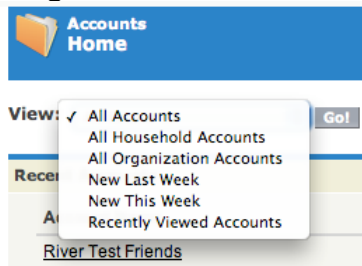
In the example below, a Search for ‘Mc’ turns up several records in order: Account records in blue, Contact records in purple, then Donation records in gold, and more. Additional information such as street address shown on the screen can provide clues to help you match the name to the correct Account record for the donation. For government agencies, acronyms and state abbreviations, or not, can make a search tricky. For instance, try both ‘RI’ and ‘Rhode Island’ in looking for a state agency account name.





If you have located the record, click on the underlined name in the blue Account section and proceed to step 7. **Note:** Do not click the underlined 'Edit' preceding the Contact name, as that will send you to a screen for editing the Account record. If you accidentally hit 'Edit' use the back arrow in the upper left hand corner of your screen to go back a step.

- If you didn't locate an Account record via the Search feature, try searching by using the Accounts tab. Click on the Account tab, selecting the 'View' for 'All Accounts' View before clicking 'Go!'



Search alphabetically for the last name by clicking on the first letter of the last name and scrolling down through the listings. Depending on your organization's settings, for letters with many last names, you may need to click to the Next page at the bottom of the screen. You can also click on the 'Name' header in order to see the list in reverse order within the letter.

When you find the correct account click on the underlined name and proceed to step 7.

Note: Do not click the underlined 'Edit' or 'Del' preceding the Account name, as that will send you to a screen for editing or deleting the Account record. If you accidentally hit one of these options, use the back arrow in the upper left hand corner of your screen to go back a step.

- If you have not found the Account name for the Donation via either step 4 or 5, you will need to create a Contact and Account record before entering the donation. Refer to Tipsheet 1.
- Make certain that you are in the Account record; the 'Accounts' tab and bars on should be blue. If they are another color, repeat steps 4 or 5 to locate the Account record.





8. This is a view of the 'Donations' section in a Household Account record.

Action	Donation Name
Edit Del	DeTest, Love Household Membership - 5/23/2008
Edit Del	DeTest, Love Household Donation - 5/23/2007

You begin recording a donation by clicking the 'New Account Donation' button. Notice that the donations recorded for this account include the account name in the donation name. One of these donations was a membership gift and one a donation. Below is an example for an organization, River Test Friends, which has also donations including a grant. Household and organization donation details are the same in the new nonprofit template.

Action	Donation Name
Edit Del	River Test Friends- Donation 5/27/2009
Edit Del	River Test Friends- Donation 6/4/2009
Edit Del	River Quality Grant

9. On the next screen, note that you are now working within the gold color-coded Donations tab. Select the Donation record type using the pick list. Donation is the default option. It is also possible that your organization may also have customized this list. In the definitions shown below, 'received' doesn't mean that the funds have been received. While that might be the case, any donation can be entered at any 'Stage' from prospecting to posted.

Record Type Name	Description
Donation	Donation Received
Grant	Grant Received
Matching Donation	Matching Donation from an Donor's Employer or other Organization
Membership	Use this record type for memberships

In general:

- 'Donation'** is used for most donations other than membership including donations of goods, stock and even land. It is not used to record volunteer service hours.
- 'Membership'** is usually used if your organization collects membership dues or donations. Organizations, especially ones that don't actively manage membership join and deactivation dates, may choose to enter membership in a more limited fashion simply by using Donations linked to a Membership Campaign, especially if they don't use rolling memberships or track membership expirations. These organizations will lose some of the reporting functionality that





comes from completing these fields, but it may be a practical consideration for other reasons. Check with your admin or volunteer advisor.

- c. **'Grant'** is used when a donation has been made for a grant for a specified purpose that must be fulfilled in order to complete the donation agreement or grant.
- d. **'Matching Donation'** is used when a donor has submitted or authorized your organization to submit paperwork for a corporate matching donation for their donation. This mainly applies to Household Accounts.

Instructions follow in order of the most common donation types. You may be referred back to earlier types of donations to help shorten these tips.





Membership Donations

10. Select 'Membership' on the Donation Record pick list.

- a. Salesforce creates a '**Donation Name**' including the account name, membership, and the current date in the title. The '**Account Name**' has also been prefilled.

- b. Fields that are required have a red bar on the left side of the entry field and each of these required fields has been populated automatically except for the 'Close Date'.
- c. **Note that the 'Amount' field is not required; you will want to enter a donation amount before clicking on the save button for all donations where the gift has been received.**
- d. In order to study and understand fundraising results, most organizations will want to add more than the required information before saving a new donation. Here are some of those considerations that may be used by your organization:
- e. '**Donation Information**' section
- '**Donation name**' – Your volunteer advisor can advise you of your organization's preferences in naming donations.
 - For small organizations, entering donations once a week or month, instead of daily, it can be helpful for donation reconciliations by your treasurer to edit the donation name date to be the check date. This is especially helpful at year-end when donations received at the start of January may have been written in December, the previous tax year.
 - If the donation was a gift of membership from someone else, you could add "gift" into the donation title to help flag this. See discussion for gift membership donations in a later section.
 - '**Amount**' – enter the dollar and, if applicable, cents, of the donation. Don't enter a dollar sign. Double-check your entry. A donor might indicate on a single donation that a set amount is for their membership and the balance is for something else. You can enter the membership details here and then enter another donation for the balance.
 - '**Close Date**' – This entry may be left as is, but it can often helpful for later reconciliation purposes to edit this entry to be the deposit date or the check date. You can edit the date





using the handy calendar feature to the right of the entry line. Check your organization's practice.

- iv. **'Stage'** – This entry must be reset in order to pull this information for status reports. If the payment is received, the status should be 'Posted'. The other options include Prospecting is 'Not Posted'. These two choices are used to indicate whether this donation has been entered or 'posted' to the accounting records. It is handy when you have a membership gift that you have confirmed via email, but not yet received. For small organizations this might be a gift via your website through a third party payer such as PayPal or Network for Good. Once we received an empty remittance envelope indicating a donation amount that was left as 'Not Posted' while a follow-up letter went out to the potential donor.
- v. **'Probability'** - Each status comes with a preset probability that your organization may have customized. Usually this field is not changed manually.
- f. **'Primary Campaign Source'** is used to link the gift to the related campaign. **This field can be critical for accounting and campaign reconciliations.** Click on the 'look up' button magnifying glass icon and select the appropriate current campaign. If the correct campaign is not listed, contact your volunteer advisor. For membership, typical campaigns might be named 'Membership Drive 20XX(yr)' or 'New Members 20XX(yr)'. The campaign may also be related to the publication source of the membership donation whether from the newsletter, brochure, web or other material. If you are unsure, ask.
- g. **'Membership Details'**
 - i. **'Membership Length (months)'** Enter the months until expiration. Again, this varies widely by organization, but the goal is to be able to report on expired memberships using Salesforce reports. The entries are easy but you must know your organization's membership renewal policy. Examples:
 - 1. If your organization's memberships are on a rolling basis, then the length is 12 months.
 - 2. Fixed membership periods:
 - a. Fiscal Year: For example, if membership renewals are mailed out in April for a fiscal year that runs from June 1st to May 31st, a membership renewed in April would run for 14 months, while one renewed in June runs for 12. The goal here is to have a membership length that won't expire before June 1st of the following year.
 - b. Calendar Year: For example, any membership donation October or later may count as membership for the following calendar year. The goal here is to have a membership that won't expire until after January 1st of the following calendar year.
 - 3. Alternatively, an organization could choose a mandatory start date and always enter 12 months.
 - 4. Some organizations may allow members to renew for more than one year at a time.
 - ii. **'Membership Start Date'** You can enter or edit the date using the handy calendar feature to the right of the entry line. Membership policies vary widely by organization: some start immediately or by check date, some by calendar or fiscal year. Check with your volunteer advisor, as this choice will affect the membership expiration date.
- h. **'Description'** is often blank, however your organization may have standard descriptions for items such as 'Gift Membership', 'New Member' or other situations. These descriptions can be displayed and sorted in donation reports.
 - i. **Proof your entry and click the 'Save' at the top or bottom of the screen.**





- ii. The next screen will show the saved 'Donation Record' with additional fields that may be edited. This Donation record is always gold.

Donations | Recurring Donations & Pledges | Campaigns or Events | Reports | Dashboards | Documents | About Nonprofit Starter Packages | Resources | ▶

Donation
DeTest, Love Household- Donation 6/16/2009 Printable View | Customize

◀ [Back to List: Accounts](#) Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Contact Roles [0] | Stage History [1]

Donation Detail Edit Delete Clone Add Matching Donation

Donation Information

Donation Record Type	Membership [Change]	Stage	Withdrawn
Donation Name	DeTest, Love Household- Donation 6/16/2009	Probability (%)	0%
Account Name	DeTest, Love Household	Primary Campaign Source	
Amount	\$25.00	Recurring Donation	
Close Date	6/16/2009		

Membership Details

Membership Status	Active	Membership Start Date	1/1/2009
Membership Length (months)	12	Membership End Date	12/31/2009
Created By	Helen Tiader , 6/16/2009 11:36 AM	Last Modified By	Helen Tiader , 6/16/2009 11:36 AM
Description			

Edit Delete Clone Add Matching Donation

Open Activities New Task New Event

No records to display

Activity History Log A Call Mail Merge Send An Email

No records to display

Notes & Attachments New Note Attach File

No records to display

Contact Roles New

No records to display

Stage History

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified
Withdrawn	\$25.00	0%	\$0.00	6/16/2009	Helen Tiader , 6/16/2009 11:36 AM

^ [Back To Top](#) Always show me [more](#) records per related list

Some areas where additional information may be commonly added include:

- i. **'Open Activities'** tracking the status of the acknowledgment task.
 - i. Creating a donation starts this process. It is commonly automated by your organization's Salesforce administrator.
 - ii. If you are responsible for sending the note, click 'edit' ahead of 'Send Acknowledgement' to enter the edit selections to show the completion or reassignment of this task. Using the task features in Salesforce can be an excellent method to communicate tasks, track the speed of completion and not let any donation go unacknowledged.





- iii. Until a task is edited to indicate completion it will appear on your home page as a reminder when you log into Salesforce. For that reason ‘Tasks’ are colored green just like the ‘Home’ tab. The person in charge of acknowledgments can choose to send the notes out later and edit the tasks via their home screen.
- j. ‘Contact Roles’ shows all contacts linked to the donation. Click the ‘New’ button to add Contact Roles.

- i. There should be a ‘Primary Contact’ assigned for each donation unless your volunteer advisor has indicated otherwise. For household accounts, this will usually be the person who signed the check.
- ii. **Even if no primary donor is assigned, by saving the record as shown above, both household members will then have this donation appear in their contact detail record. Note that the Contact fields are pre-filled with the account names – a timesaving feature compared to using the lookup button.**
 1. Otherwise the donation will only be visible within the account record and the rollup totals and membership info on the contact detail page.
 2. Campaign and event reporting will not include this donation properly.
 3. If there are any more contacts that should be recognized perhaps for a couple with separate contact records or for a gift membership you may use the Contact fields to look up these Contacts. Use the Role pick list to assign their relationship to this donation. Your organization may have customized these pick list fields:





‘Donor’ more than one person can be a donor, but only one may be indicated to be the ‘Primary’ Donor by the blue dot to the left of the name. The donor is typically the person or persons who actually gave the donation or the contact representing the organization that gave the donation. For example, if someone donates speaker fees on behalf of another organization, usually the check determines the primary donor, but the other party may also be counted as a donor after all both parties should get thanked. However, some organization accounts may not have a ‘donor’ role.

‘Soft Credit’ can be the person who brought in the donation, perhaps a Board member or Fundraising volunteer, or someone hosting an event at their home, or someone who was honored or memorialized by a donation.

‘Decision Maker’ can be used for a grant officer, but if an individual gave through a grant from their private foundation, often this individual is simply left as the primary donor.

The contact roles detail is most often expanded for larger gifts.

- k. **‘Activity History’** where additional activity about a donation can be recorded. Editing will occur on a green color-coded screen and may create additional follow up tasks. Using this area can help track where you have personalized your communications with donors. Perhaps a check was lost or a Board member personally called to thank the donor for the gift. These actions can be noted in this section. Note that items inside the comments cannot be sorted in reports.
 - i. Here is an example for a call and follow-up task to send an acknowledgement letter.





Log a Call Help for this

Task Edit Save Cancel

Task Information Required Information

Assigned To: Helen Tjader
 Subject: Call
 Due Date: 6/16/2009 [6/16/2009]
 Phone:
 Status: Completed
 Name: Contact Lovely DeTest
 Related To: Donation DeTest, Love Household N
 Email:
☐ Send Notification Email

Description Information

Comments: Thanked Lovely for her gift.

Schedule follow up task

Task Information

Assigned To: Helen Tjader
 Subject: Send Letter
 Due Date: 6/18/2009 [6/16/2009]
 Priority: High
 Status: Not Started

Description Information

Comments: Send acknowledgement

☐ Send Notification Email

Reminder

Reminder: ☒ 6/16/2009 8:00 AM

1. Once saved, the donation record now shows the completed activity and the open activity

Open Activities							New Task	New Event
Action	Subject	Name	Task	Due Date	Status	Priority		
Edit Cls	Send Letter	Lovely DeTest	✓	6/18/2009	Not Started	High		

Activity History							Log A Call	Mail Merge	Send An Email	View All
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/T				
Edit Del	Call	Lovely DeTest	✓	6/16/2009	Helen Tjader	6/16/2009 12:16 PM				

- m. ‘Notes and Attachments’ where a copy of the acknowledgment can be attached.
 - i. Using this area an electronic file can be attached to the donation record. This is a great area to attach custom, personalized letters whether in word or as a scanned document.
 - ii. ‘Note’ contents cannot be sorted in a report. Notes can also be private so that confidential information could be entered here.
 - iii. **Tip:** Don’t spend time to scan standard letters and attaché them; standard acknowledgments can be stored using the ‘Documents’ tab.
- n. **NOTE:** For every donation associated with a campaign or event it is critical to also update each donor’s Contact ‘Campaign and Event History’ detail section. This is a separate step described in the tip sheet for ‘Campaign and Event History’.





Account Donations

1. Entering a new Donation from within the 'Account' record. Start by clicking the 'New Account Donation' button. Select a 'Donation record Type' of 'Donation'.
 - a. If your organization receives membership donations, this will be the next most frequent donation type. Most other donations of funds, stocks, goods and land will fit into this category.
 - b. **Reminder, 'Recurring Donations and Pledges' are entered using a different procedure.**
2. The new donation record appears on a gold screen beneath the gold 'Donations' tab. It is identical to the membership donation screen except for the omission of the membership details section.
 - a. Descriptions used for donations may be standardized. Examples: 'Memorial Gift', 'Honorary Gift', 'Stock Gift – 12 shares ATT', 'Land – Plat 12 Lot 13 – Sunny Acres' 'Restricted – General Endowment'. These types of descriptions can be shown and sorted in donation reports.

- b. Proof the donation screen and click either of the 'Save' buttons on the screen.
- c. You will be taken to the 'Donation Detail' record. This screen is the same for all donations.
 - i. **Add the Contact Roles that are now empty by clicking 'New'.**

- ii. See the earlier discussion of this critical step under membership donations.
- iii. Additionally, if a Dedication Recipient is already a Contact, be sure to edit the 'Contact Roles' to indicate their role in this donation – usually as a 'Soft Credit'. If a Dedication Recipient is not a Contact, check with your volunteer advisor for your organization's policy on adding them as a Contact.
- iv. **Tip: If you are acknowledging a donor's special gift in a newsletter, it may be important to add a Contact and Household for the deceased relatives or for an honoree so that they will be included on the newsletter mailing list. Your organization may choose to specifically block them from some solicitations or automatically provide a limited membership. Check with your volunteer advisor.**
- d. **Tip: Your organization may wish to create a task for an additional person if special gifts such as supplies or memorials are routinely acknowledged in their organization newsletter or other publications in addition to a direct acknowledgment.**





Grant Donations

1. Grants Overview –

- Grants tend to be much less frequent, but more involved than other types of donations.
- Grants are generally from organization accounts where ‘Contacts Roles’ may be held by staff. ‘Affiliated Contacts’ roles may also be completed for these more complex accounts.
- Grant activities may be recorded into Salesforce long before the checks arrive. Communications and task tracking activities, key features of Salesforce, are important for grant management. Key grant documents and correspondence can be attached to the donation record for handy reference and for access online by your organization’s Salesforce license users.
- Depending on your role in entering data and your organization’s practices, the receipt of a check may require an update of an existing donation record that was entered or updated when a grant application was submitted. Be sure to consult your volunteer advisor on your role before making any grant entries.
- Since grants are sought from many sources, be sure the potential grantor and contacts are included in your database and their information is current. Often a Board member such as the Treasurer or a Fundraising Staff member may be entering the first records tracking grants. Sometimes no entry may be made until a check is received.

f. ‘Donation Information’

- ‘**Donation Name**’ always includes the organization name. Your organization may want this name to include both the account name and the grant title. The date is not pre-filled for grant donations.
 - ‘**Close Date**’ may be the decision date for the grant or expected funds distribution date for a grant awarded. **Note** this is the only required field that is not automatically filled. You must make an entry here before saving the Donation record.
 - Other fields are similar to other donation fields. Stage is more likely to be actively used.
- g. Be sure to enter Contact Roles for the grant on the Donation detail record.
- Tip: Be sure the mail and other communications settings are accurate for Contacts and Affiliated Contacts for the grantor account.** For example, you may want to be sure that the contacts each receive the next newsletter with an article highlighting their organization’s grant award and subsequent newsletters as your organization proceeds through steps fulfilling the grant. But you probably won’t want those contacts to be bothered with a membership solicitation.





Matching Donations

1. **Matching Donation** entry fields are identical to other types of donations. **The key decision to be made is whether to enter a matching donation via a Household Account or via the Organization Account.**
2. **Tip: While the donation may be initiated by a Household account, paperwork is sent to an Organization account that eventually writes the check. Enter this type of donation via the Organization account to better track their involvement and communications.**
3. The organization account may not be in your database, check before beginning a donation.
 - a. **Tip: Be sure to enter the correct organization and address.** For example, the donation may come from the AT&T Foundation in New Jersey, not the AT&T Corporation in state employing your household account contact. Forms would get mailed to New Jersey.
4. An example Matching Donation screen is shown below for an organization account, River Friends. The Contact Matching Role has been entered in the description field.
 - a. Your organization may choose to edit the 'Donation Name', perhaps adding 'Matching' into the standardized name.
 - b. The 'Close Date' should be the anticipated receipt date. Some organizations send out donations quarterly or by the 15th of the following month.
 - c. The 'Stage' is set as 'Pledged'.
 - d. Although not shown here, a campaign should be linked if your organization uses this function. The match could be assigned the same campaign as the donation its based on or a campaign could be set up to include all 2009 matching donations.
 - e. A standardized description has been included for reporting.

Donation Edit
New Donation

Donation Edit Save Save & New Cancel

Donation Information

Donation Record Type Matching Donation

Donation Name River Test Friends - Donati

Account Name River Test Friends

Amount 15.00

Close Date 6/16/2009 [6/16/2009]

Stage Pledged

Probability (%) 50

Primary Campaign Source

Recurring Donation

Description Information

Description Matching - Itsa Test Household

Save Save & New Cancel

5. Contact Roles are edited in the saved donation record. The organization contact and the household contact are recorded. The organization contact is provided and the household contact was retrieved using the lookup button. Your organization will choose which account should be the primary donor, if any, and which contact roles to choose. For example both Ida and Itsa could be donors. This donation will appear in the Contact Donation Detail for everyone assigned a Contact Role for this donation.





Contact Roles for River Test Friends- Donation 6/16/2009

Primary	Contact	Role
<input type="radio"/> No Primary Contact		
<input checked="" type="radio"/>	Ida B. Testing	Evaluator
<input type="radio"/>	Itsa Test	Soft Credit
<input type="radio"/>		Donor
<input type="radio"/>		Donor

6. In the donation detail, it is helpful to add in tasks noting any filing and receipt deadlines and attaching scanned copies of files sent.

The End

