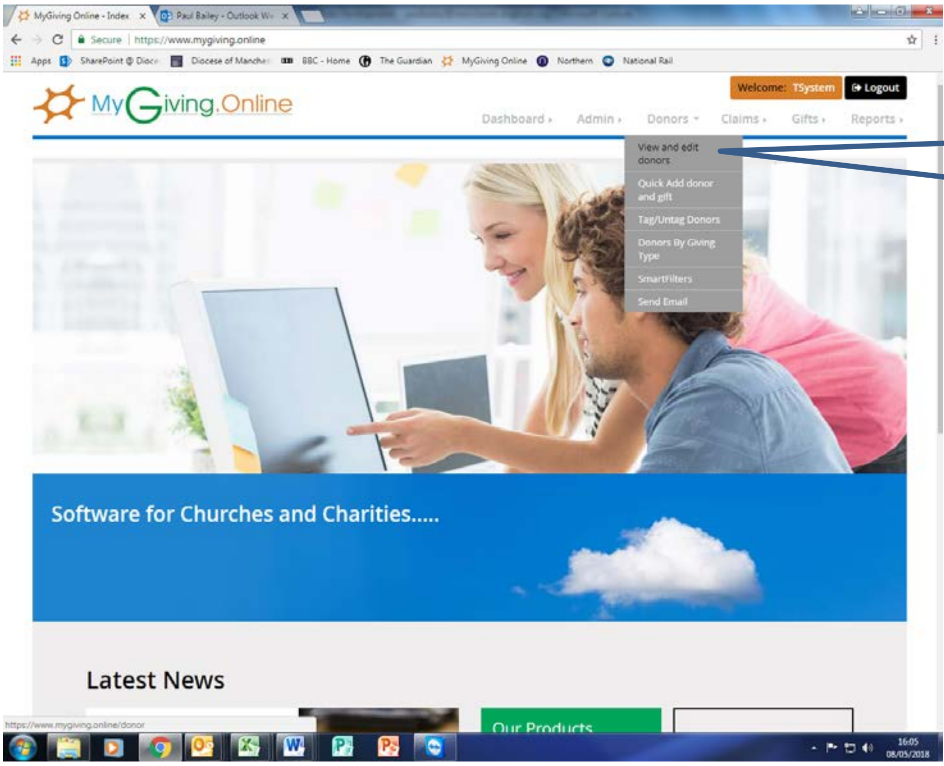
GAL3 - Navigating your way around the donor record

This is a guide to the tabs you will see when opening up a record for one of the donors to your Church. All of the different options available, including drop down menus and tick boxes, are explained to enable you to gain a clear understanding of their purposes.

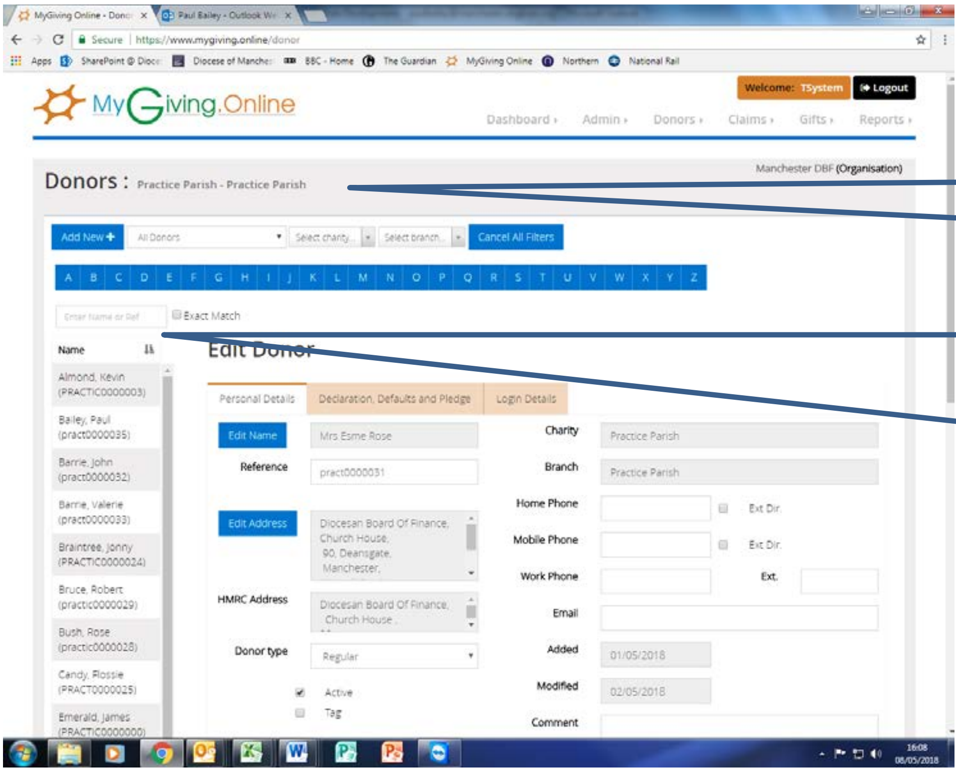
It is important when creating/editing your records that you adopt a uniform method to ensure you get the most out of the system in the future.

- Step 1



Click on Donors and View and edit donors.

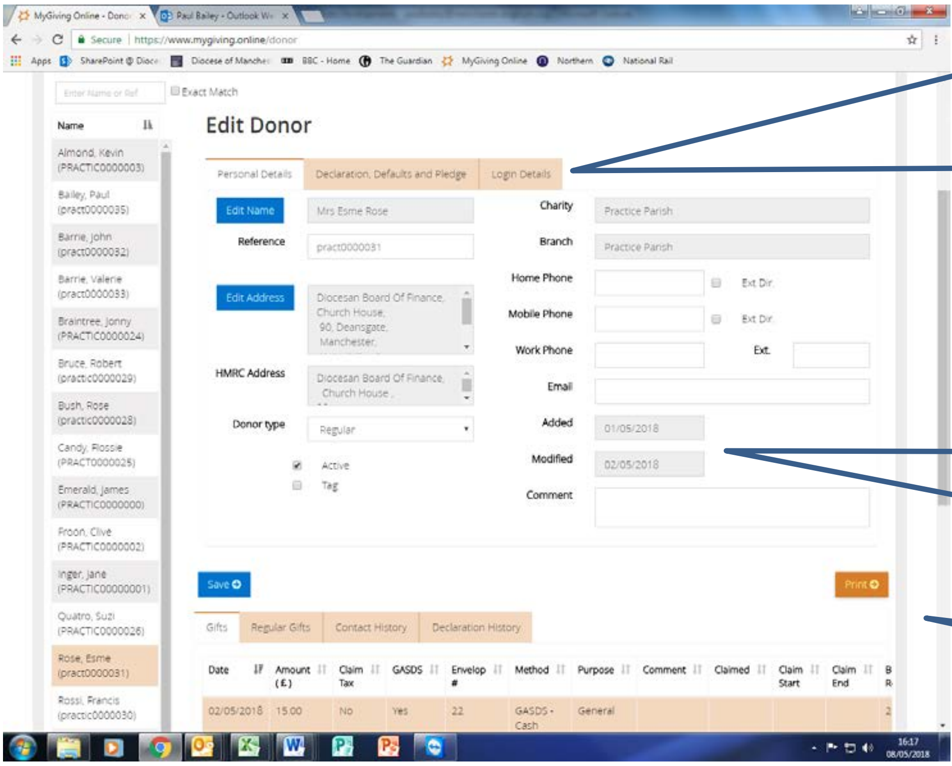
- Step 2



The Donors screen will appear for your Church.

You can search for a donor by typing their surname into the search box, or choose one from the list on the left hand side of the screen.

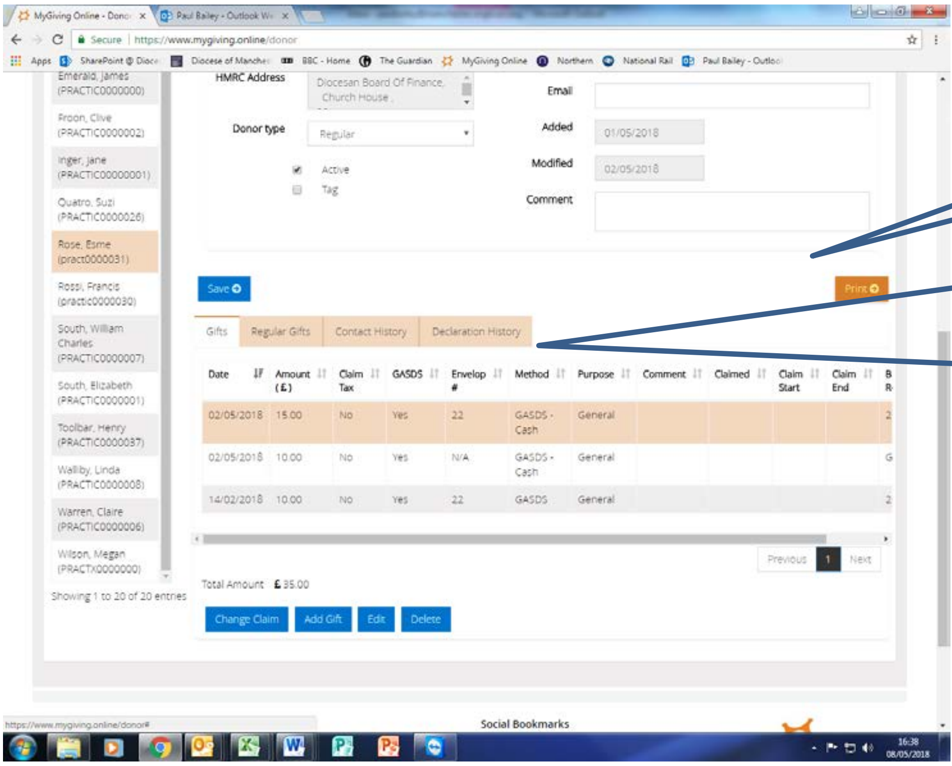
- Step 3



This is the screen you will see for your donor. It contains three tab options – Personal; Declaration, Defaults and Pledge; and Login Details.

The date the record was added and last modified is shown here.

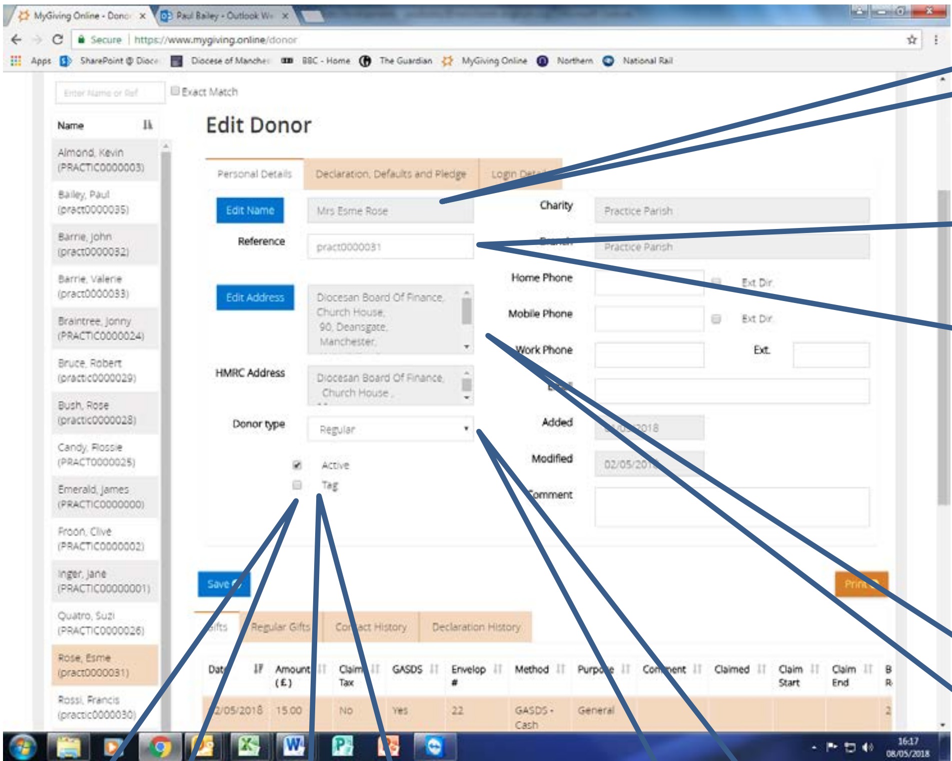
You can scroll down to see the rest of their information.



The view at the bottom of the screen looks like this.

A number of tabs are available including – Gifts, Regular Gifts, Contacts History and Declaration History.

- Step 4 – Personal Details



The donor’s full name appears here.

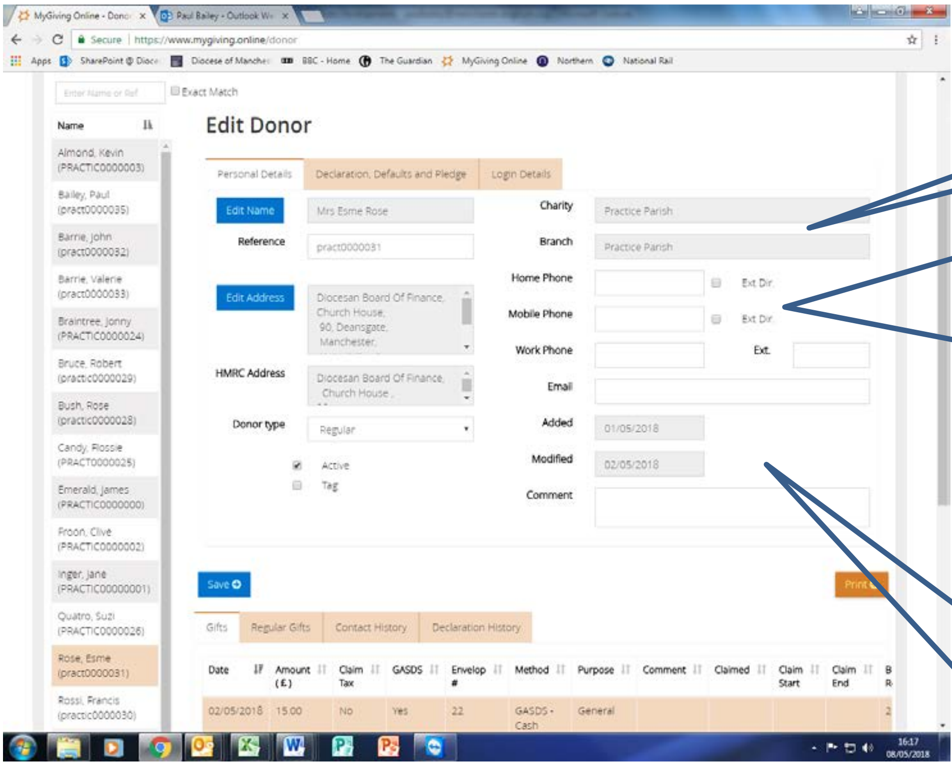
Each donor has their own unique reference number. This includes your Church reference, one letter (X, A or B), and then 7 incremental numbers (i.e. practic0000031).

The donor’s home address and post code must be added if you are claiming Gift Aid.

You can tag a donor, which allows you to search for tagged donors. Only use this for donors who can’t identified by another means.

If you untick the Active box, the donor’s record will be inactive.

Choose their Donor type from the drop down list.

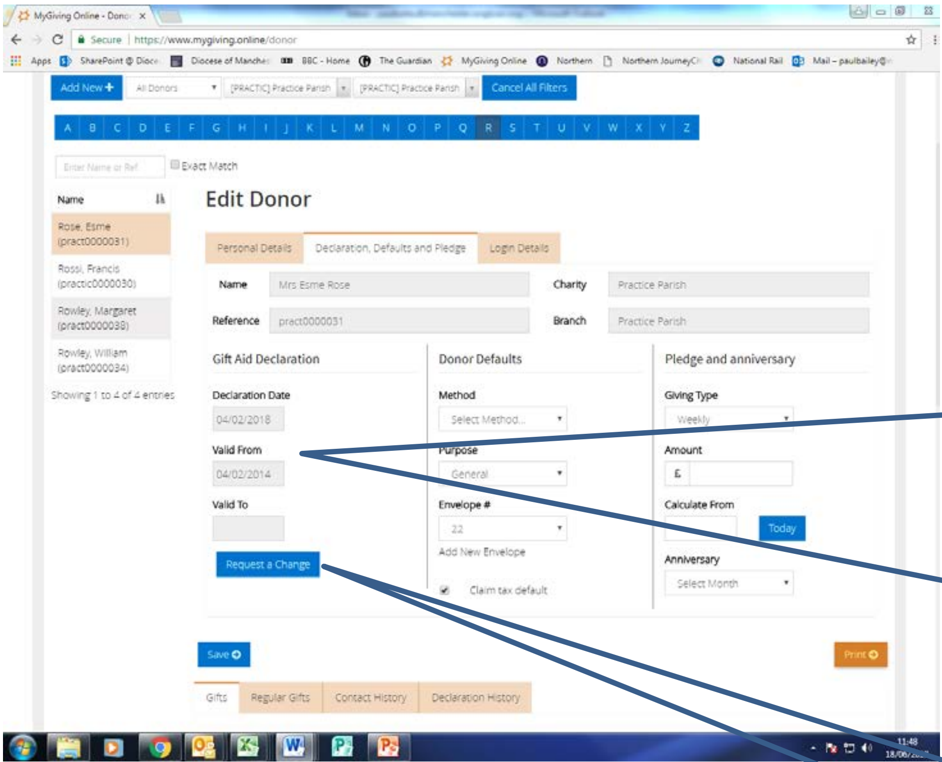


The donor's Charity and Branch choices are displayed here.

Home, work and mobile numbers, and email addresses are added here. Home and mobile numbers can be marked as Ext Dir.

A comment can be added here. For example, the person prefers to be contacted via email.

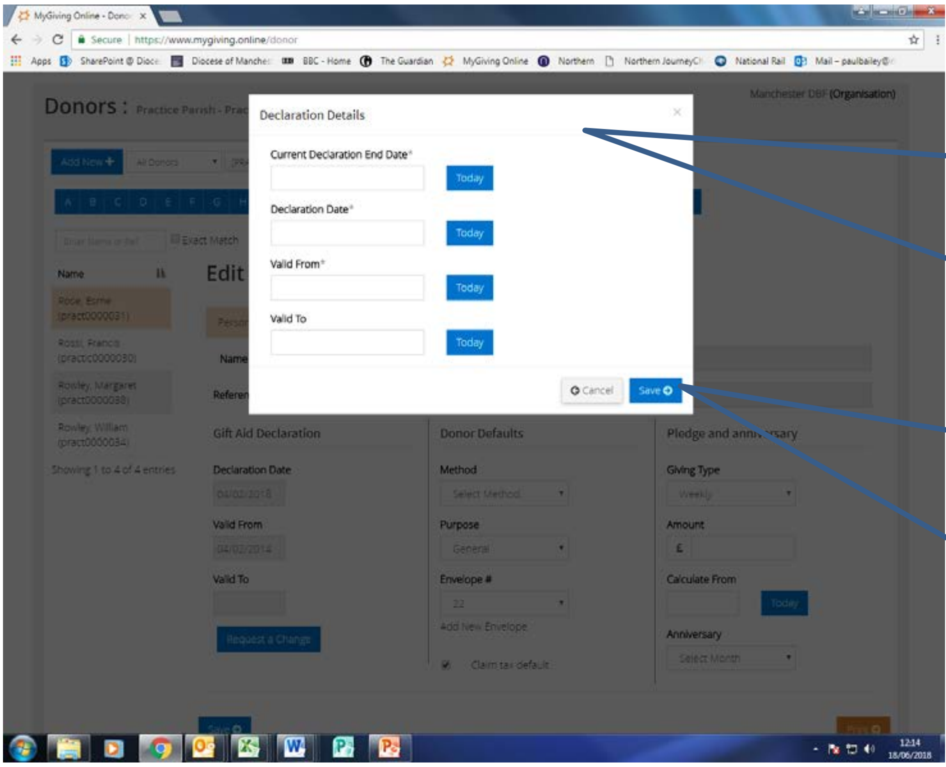
- Step 5 – Declaration, Defaults and Pledge



The Gift Aid declaration details are saved here. For a current declaration this will show the Declaration Date and Valid From date. If the declaration has expired it will also show the Valid To date.

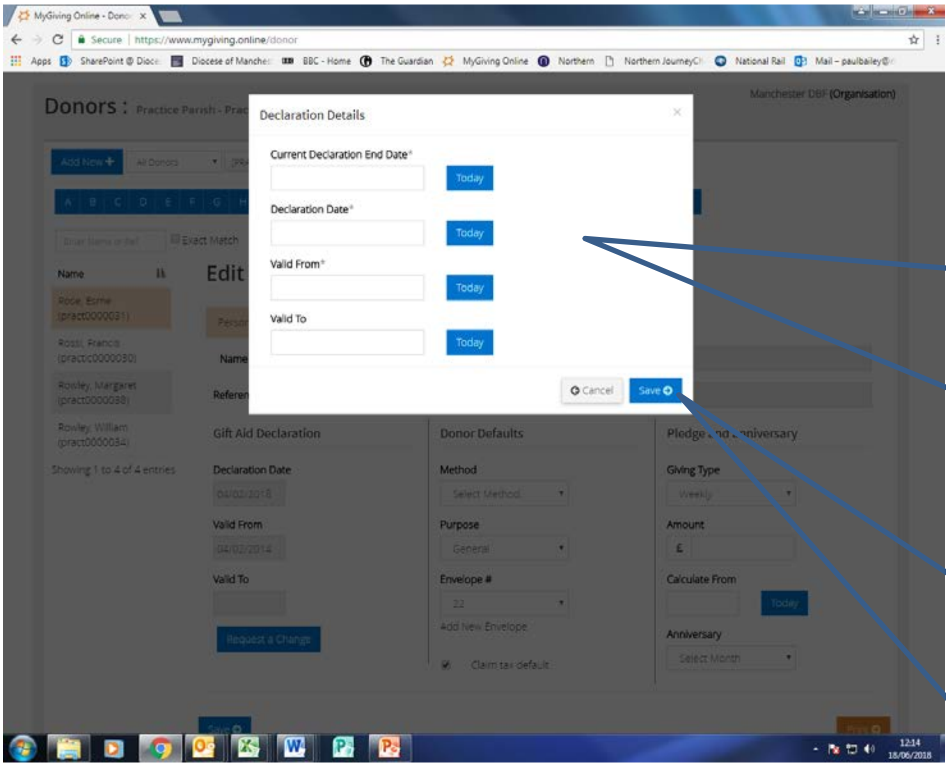
If it is a new record no dates will be shown here.

To add a new declaration or make a change, click on the Request a Change button.



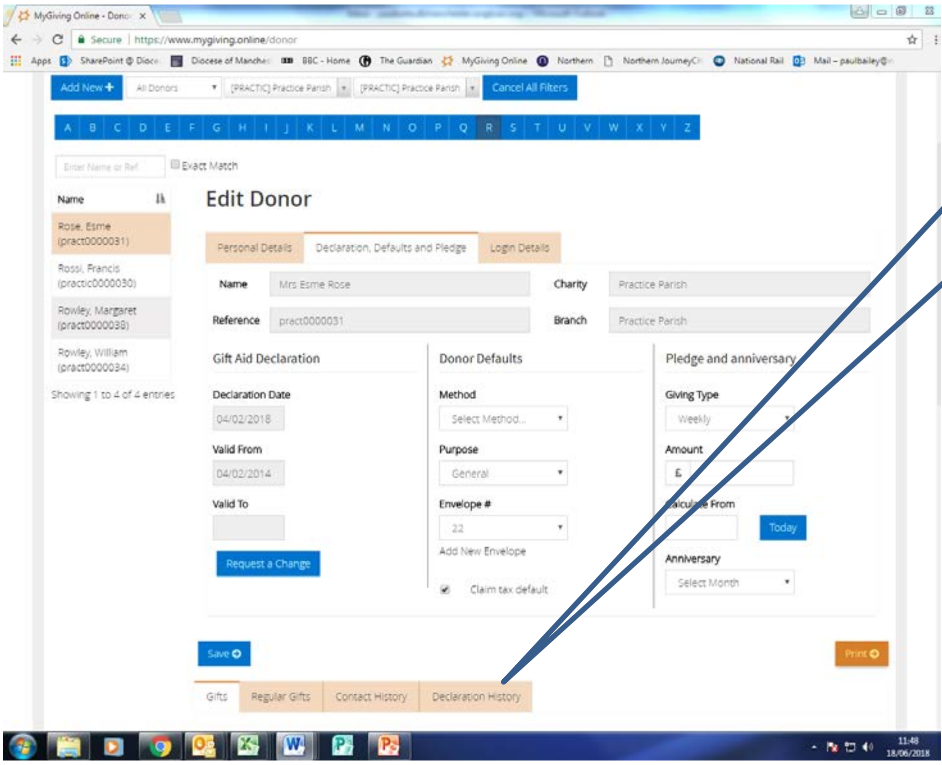
For a new declaration – enter the Declaration Date and Valid From dates. If this is a new one-off Gift Aid envelope you'll need to add the Valid To date as well.

Click on Save, and then send a copy of the declaration via post or email to Sue Warren at Church House. Once this has been received and verified the dates will appear in the boxes.

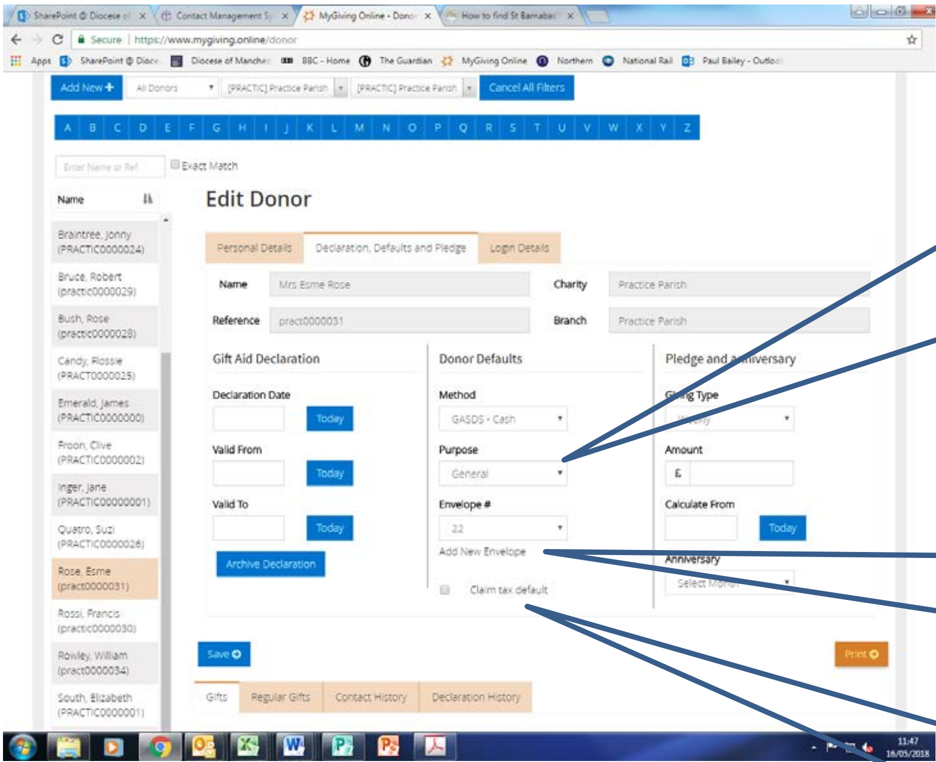


For an amended declaration – enter the Current Declaration End Date, Declaration Date and Valid From dates. If this is a new one-off Gift Aid envelope you'll also need to add the Valid To date as well.

Click on Save, and then send a copy of the new declaration or the Gift Aid envelopes via post or email to Sue Warren at Church House. Once this has been received and verified the dates will appear in the boxes.



Previous Gift Aid declarations and the dates from envelopes will appear in the Declaration History tab.

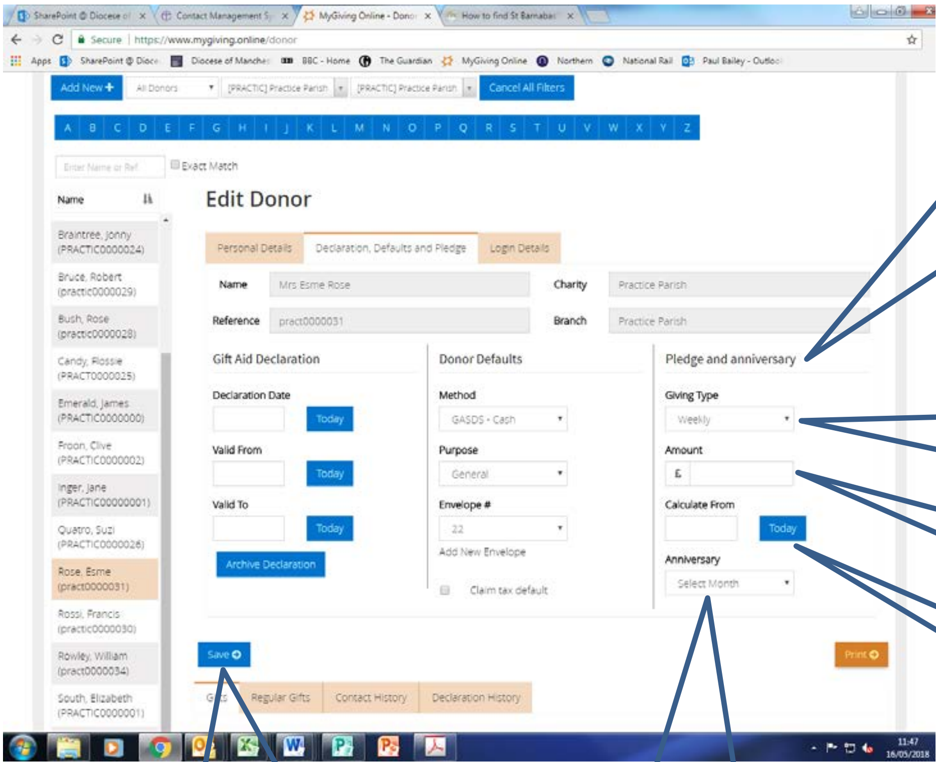


The Donor Defaults can be chosen here. You can specify the donor's preferred Method, Purpose and Envelope number from the drop down boxes.

A new envelope number can be added by clicking here (see below for more details).

If the donor is a taxpayer and has completed a Gift Aid declaration, click on the Claim tax default tick box.

Type in the envelope number, add a comment if required, and click on Save.



Use the Pledge and anniversary section to forecast the size of donation expected from your donors over a period of time.

Choose their Giving Type from the drop down list.

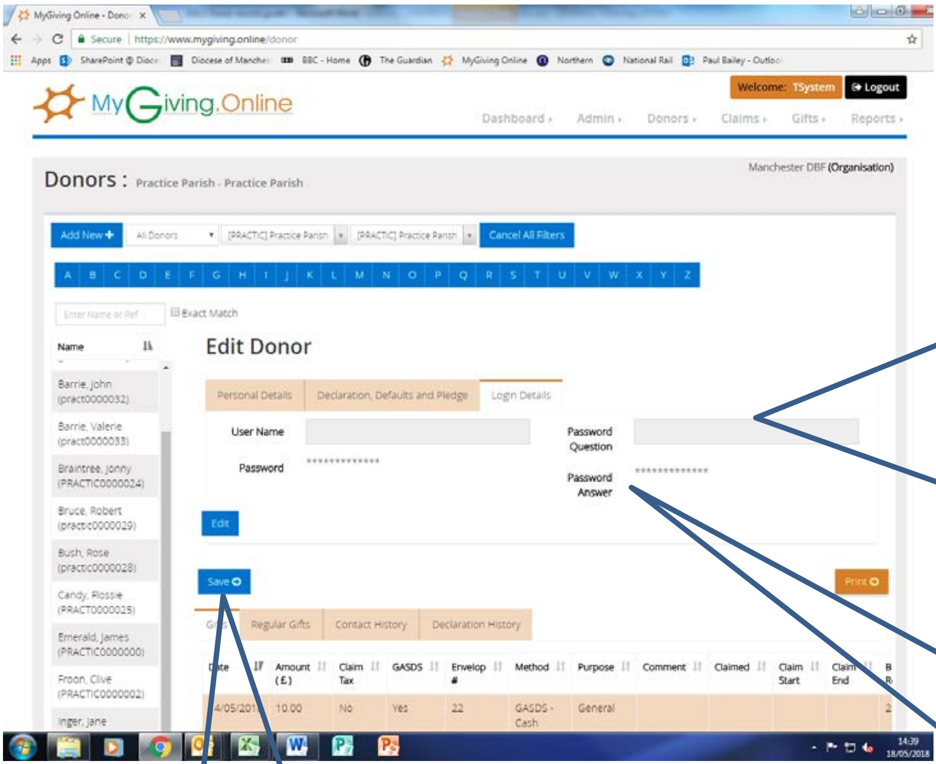
Type in the donation amount.

Type in the date you'd forecast to start, or click on Today.

Click on Save to store your changes.

Select a month from the Anniversary drop down list. This could the month of the original donation or the start of your financial year.

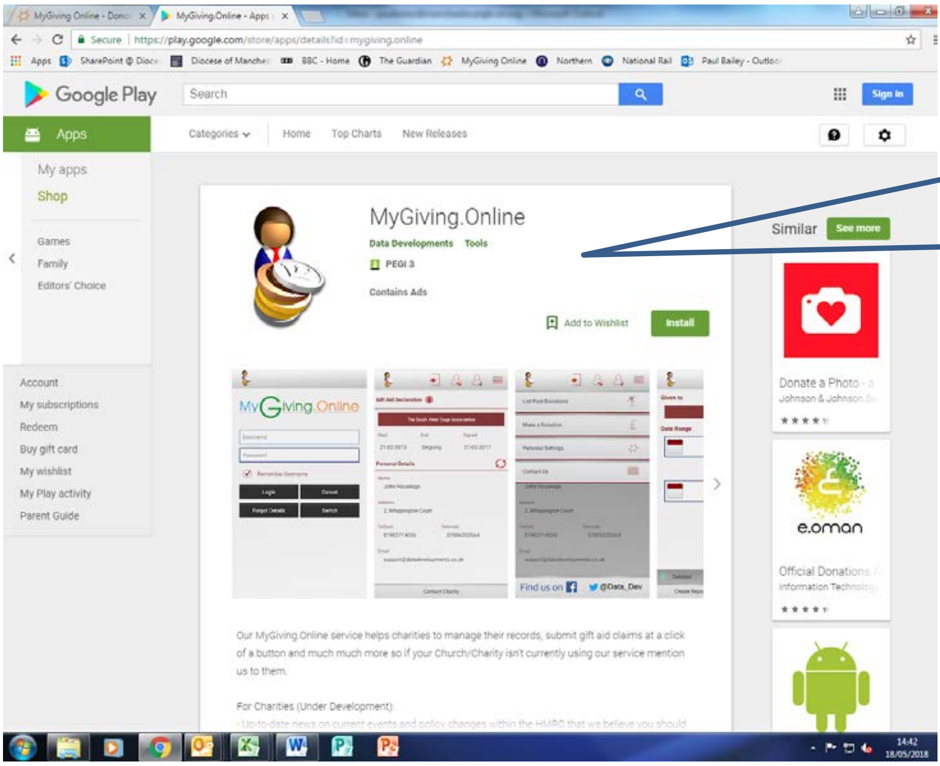
- Step 6 – Log In Details



Using the My Giving Online website or app (see below), donors can access their own details and giving record. This is particularly useful if they are a higher rate taxpayer and need to provide details of their giving for a tax return.

The User Name and their Password can be added here. You can also add a Password Question and Password Answer here.

Click on Save to store your changes.



The MyGiving.Online app can be downloaded from Google Play and Apple App Store.