GAL18 – Importing donations from a spreadsheet

My Giving Online provides a facility to import your donations directly from a template spreadsheet. This needs to be created in the way outlined in this guide otherwise it will not work for you. This has already been created and can be sent to you via email if you'd like a copy.

This will be particularly useful for those Churches who do not have access to electronic bank statement and use spreadsheets to record their donations, or to transfer information from Treasurers to Gift Aid Secretaries to be inputted at a later stage.
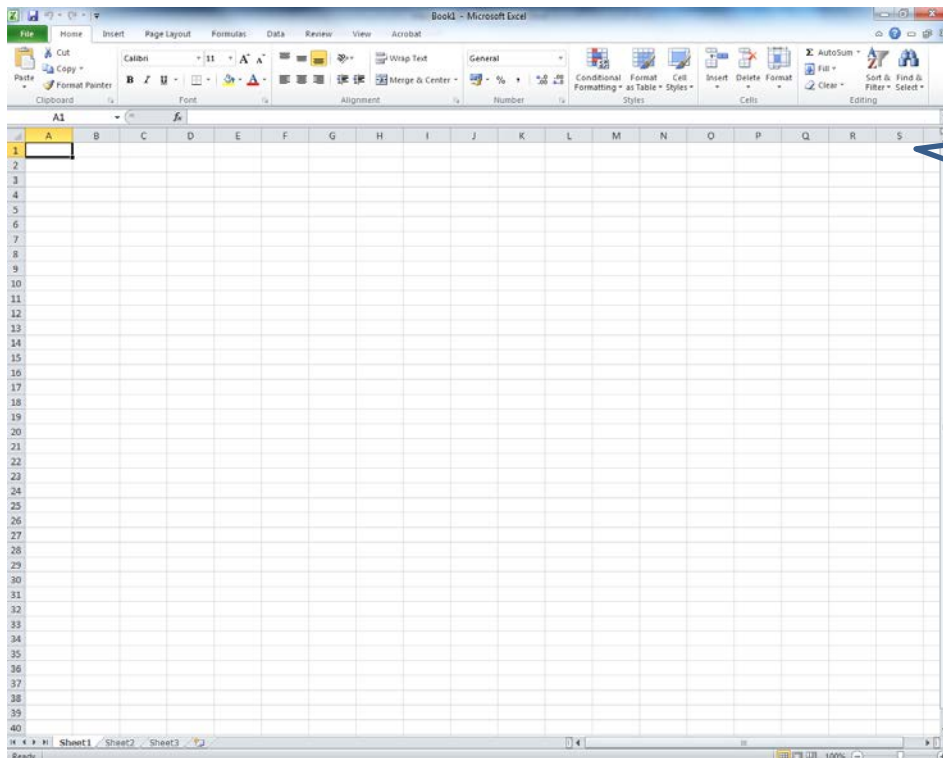
Please note, if a donor record does not exist to receive the donations you are importing, you'll need to create a record before proceeding.

The following step-by step guide provides instructions on how to do this in the following sections:

1. Creating a template spreadsheet
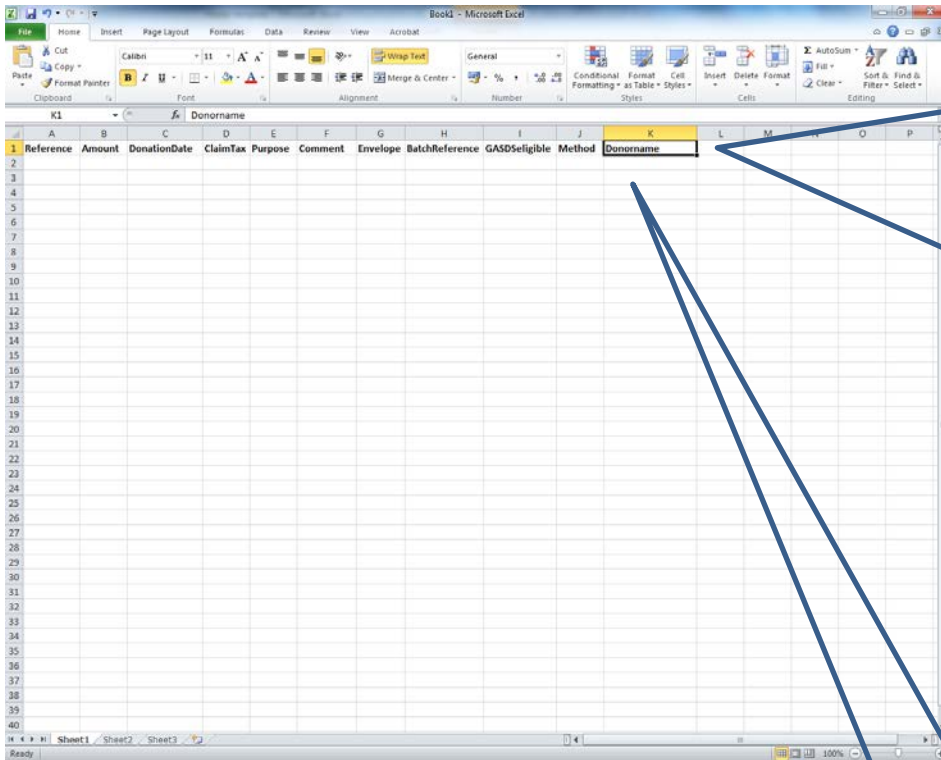2. Importing the spreadsheet into My Giving Online

1. Creating a template spreadsheet

- Step 1



Open a new spreadsheet.

- Step 2

In separate cells along the top row enter the following wording exactly as typed:

Reference
Amount
DonationDate
ClaimTax
Purpose
Comment
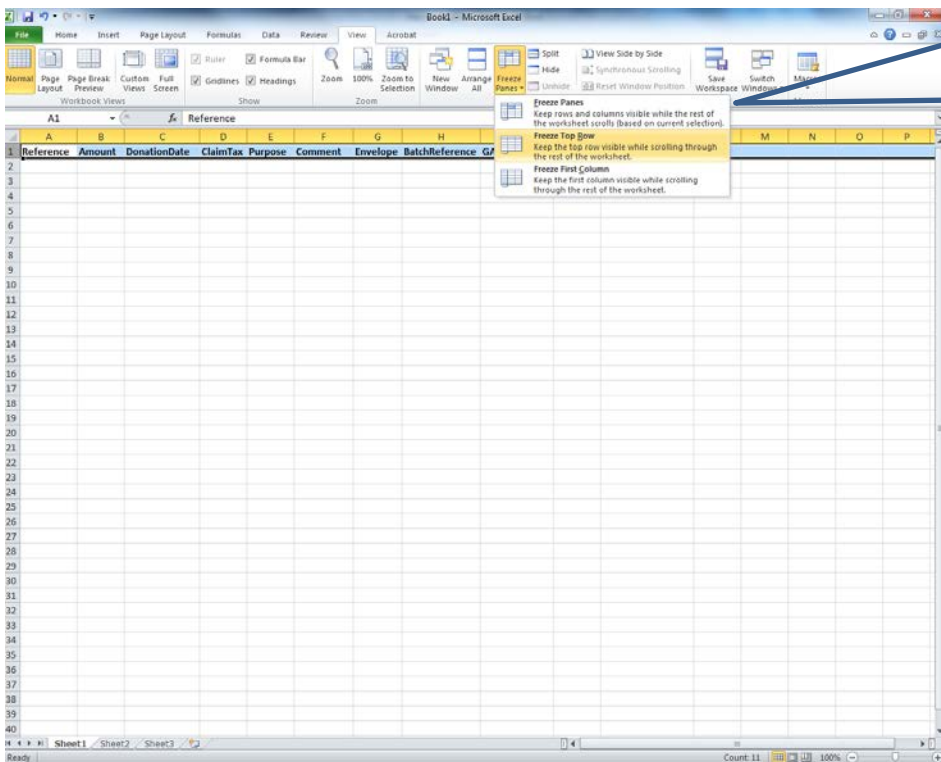Envelope
Batchreference
GASDSeligible
Method
Donorname

The Donorname field isn't required by My Giving Online as part of the import process, so it can be excluded if you wish. However, it is useful to have it as a simple visual identifier. Please ensure you add this column name as the last one on the right hand side of the sheet. Note, if the Donorname column is created in column A, this will prevent the spreadsheet from being imported.
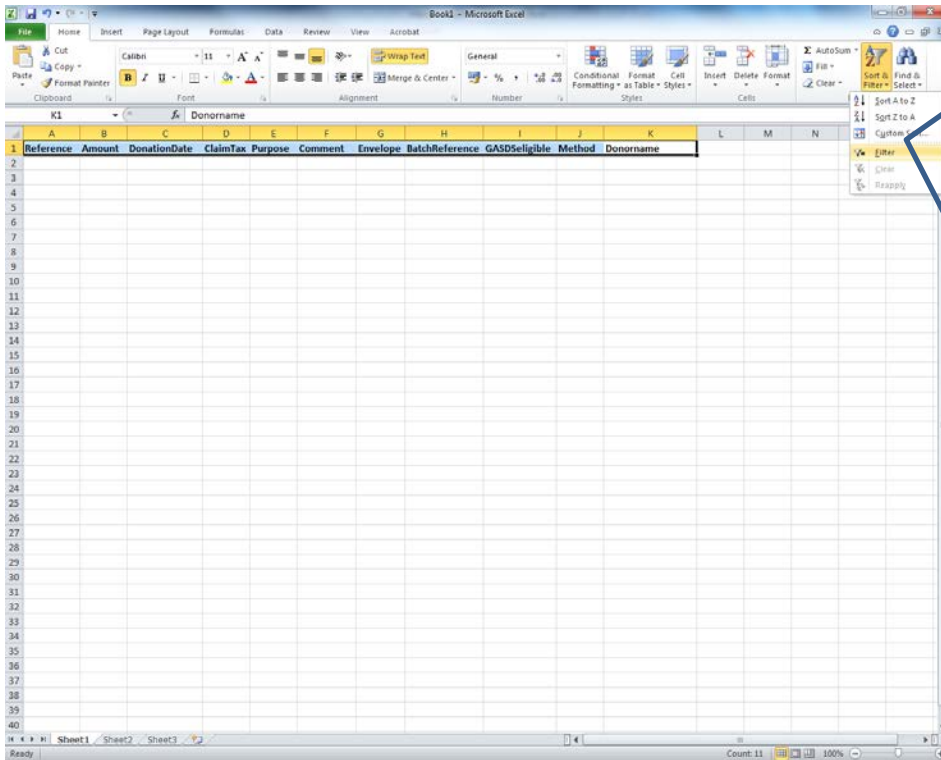
- Step 3
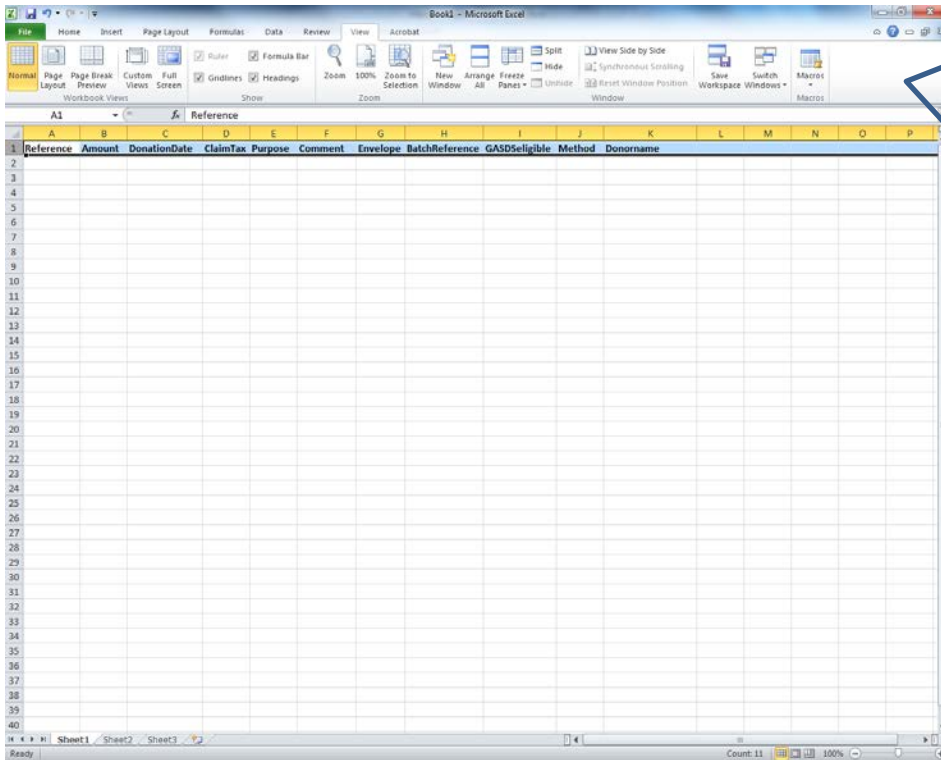
If you'd like the column names to be visible as you scroll up and down the sheet, click on the top row to highlight it.
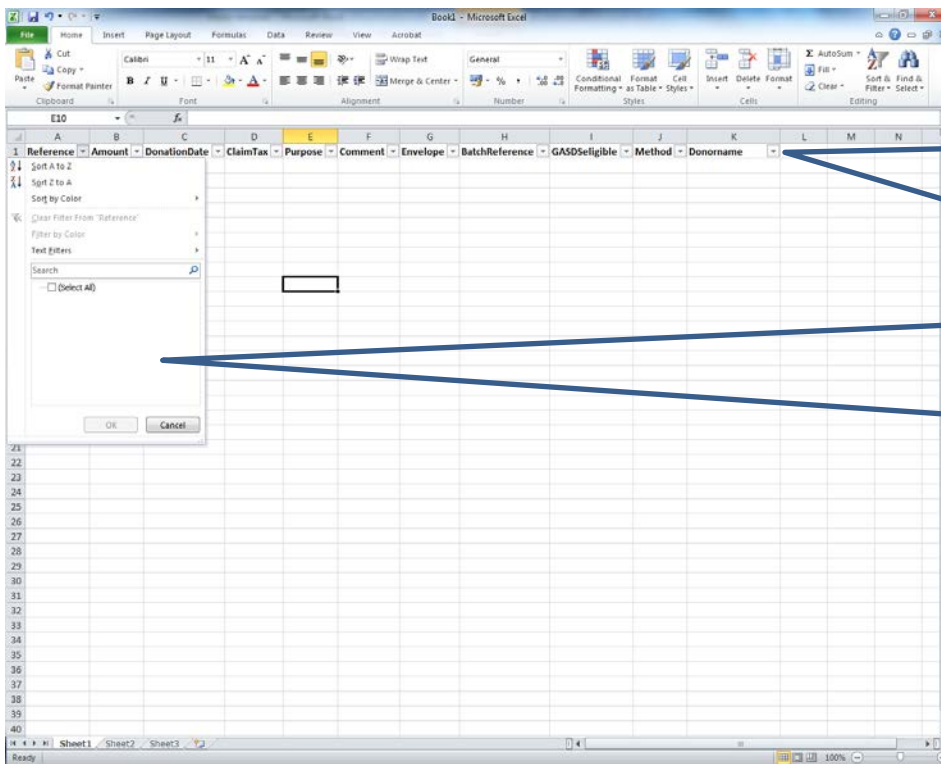
- Step 4

Click on the View tab and Freeze Panes, and from the drop down list click on Freeze Top Row.

- Step 5

If you'd like to filter and sort the data you are entering (e.g. specific Purposes or Envelope number order), firstly you'll need to highlight the cells on the top row. Secondly, in the Home tab click on Sort & Filter, then click on Filter.
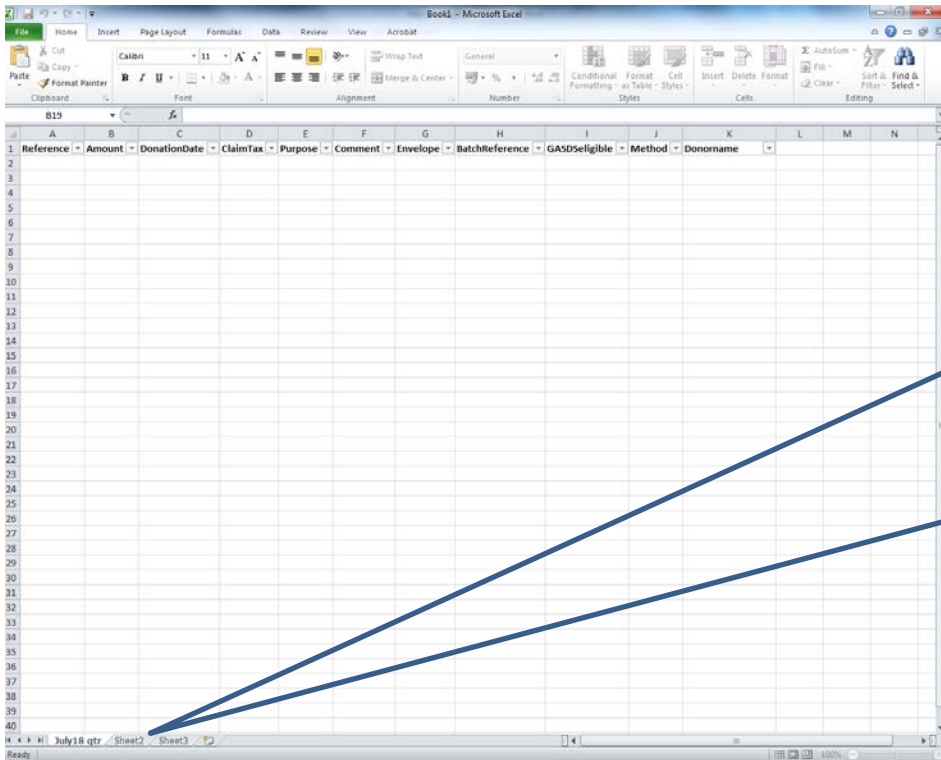
- Step 6

You'll notice that drop down arrows have appeared next to the column names.

When you click on the drop down arrow a menu will appear. Your data can then be sorted A to Z, Z to A, and specific text can be searched for.

- Step 7

It will be good practice to create a worksheet for each month or quarter. The worksheets along the bottom (Sheet1, Sheet2, Sheet3) can be renamed. Double click onto the Sheet title and type in the name of your choice (for example, July18 qtr).
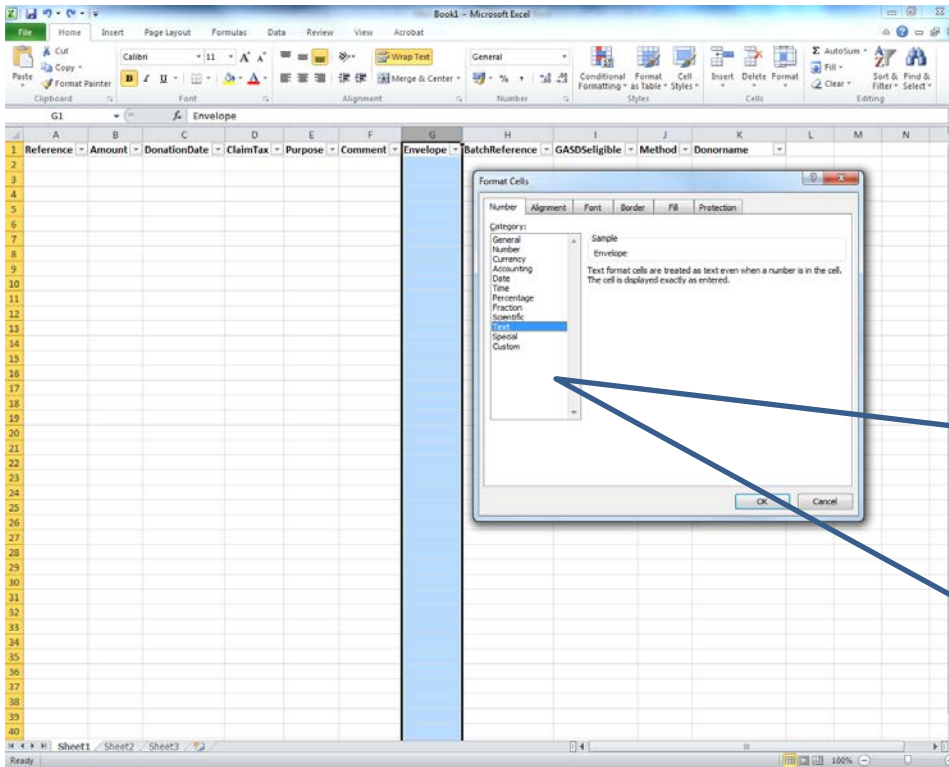
- Step 8
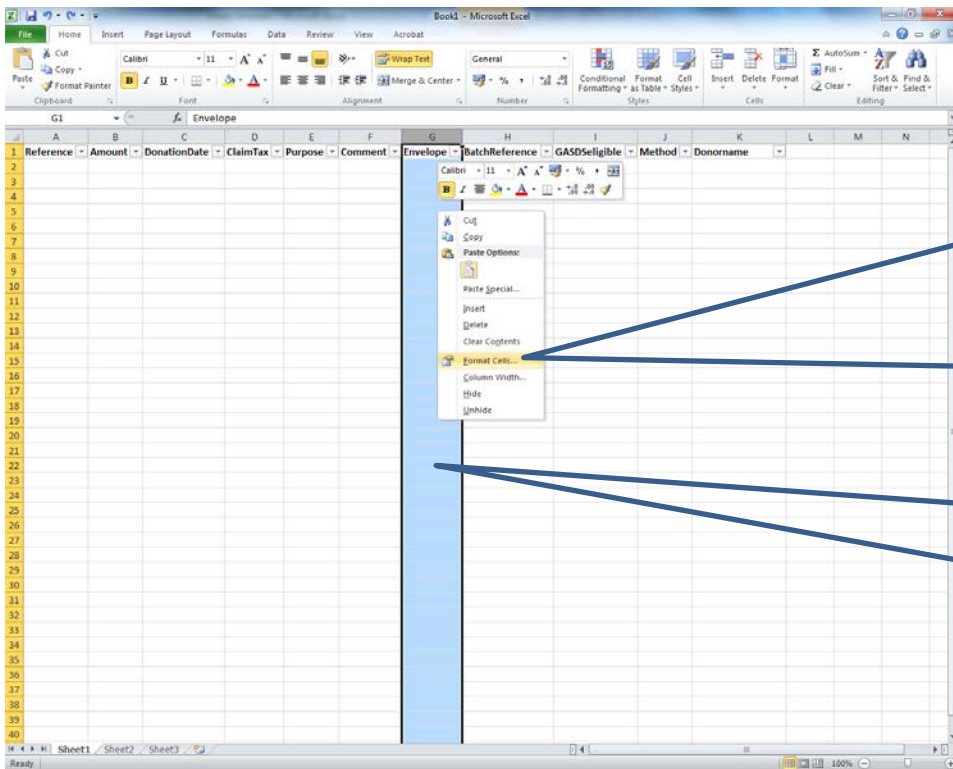
To sort the envelope numbers alphanumerically you need to format the cells. To do this highlight the column and right click on your mouse. This menu will appear and you need to click on Format Cells.

If the donor doesn't have an envelope number leave the cell empty (don't add N/A or similar).

- Step 9

If you wish to alphanumerically sort your donors within My Giving Online you'll need to use a three or four digit recording method (e.g. 012 or 0012). To enable this to be used within the importing process the cells need to be formatted as Text. In the number Tab click on Text and then OK.
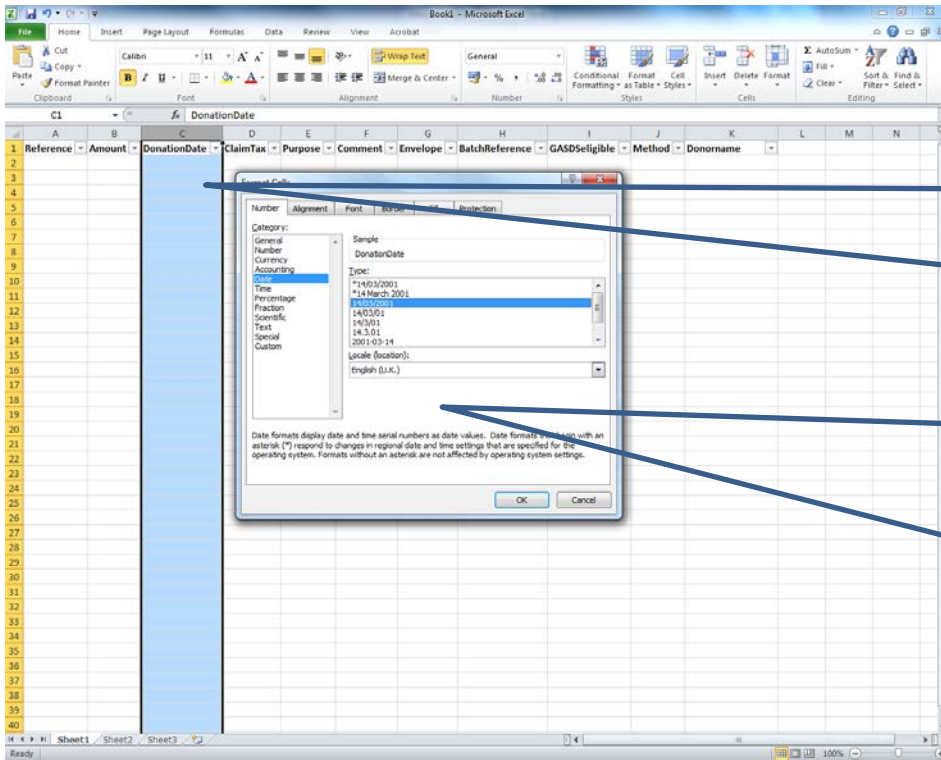
- Step 10
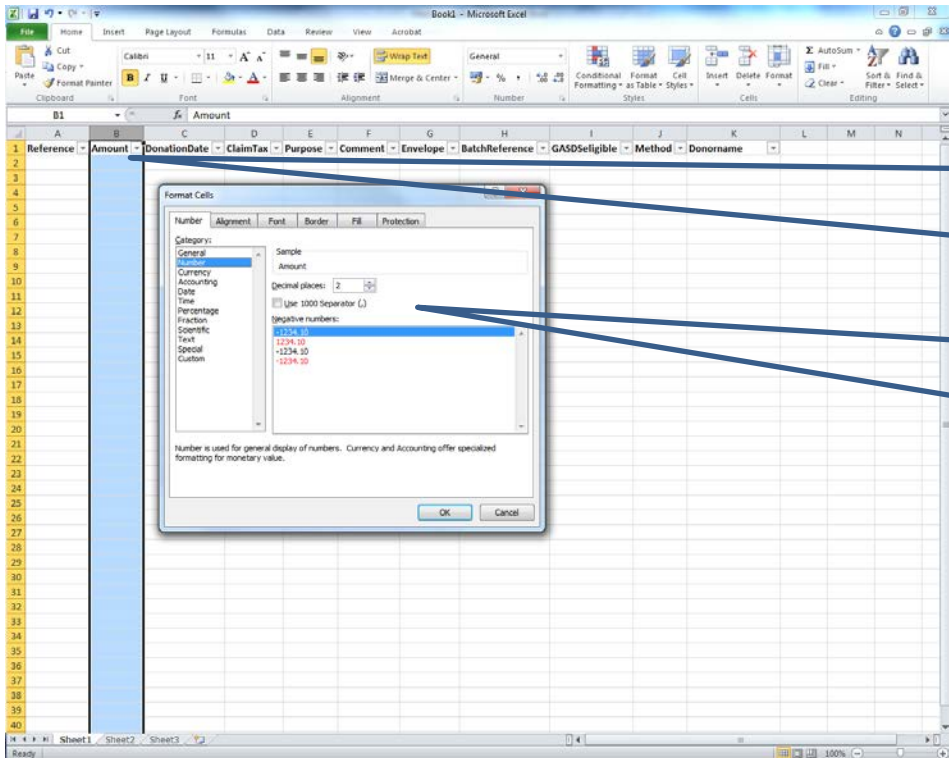
Once you have highlighted the column called Amount, repeat the instruction in Step 8.

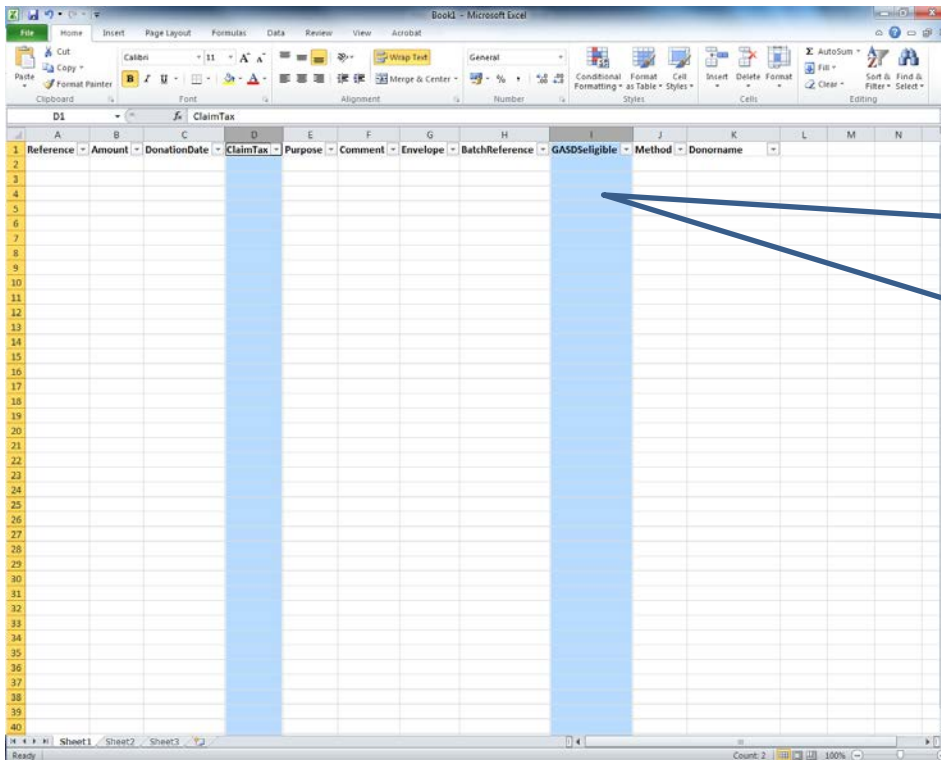In the Number tab click on Number (not Currency) in the list and then OK.

- Step 11

Once you have highlighted the column called DonationDate, repeat the instruction in Step 8.

In the Number tab click on Date. In the list of options in Type choose 14/03/2001 from the list, ensure English (UK) is entered in the Locale (location) field, and then click OK.
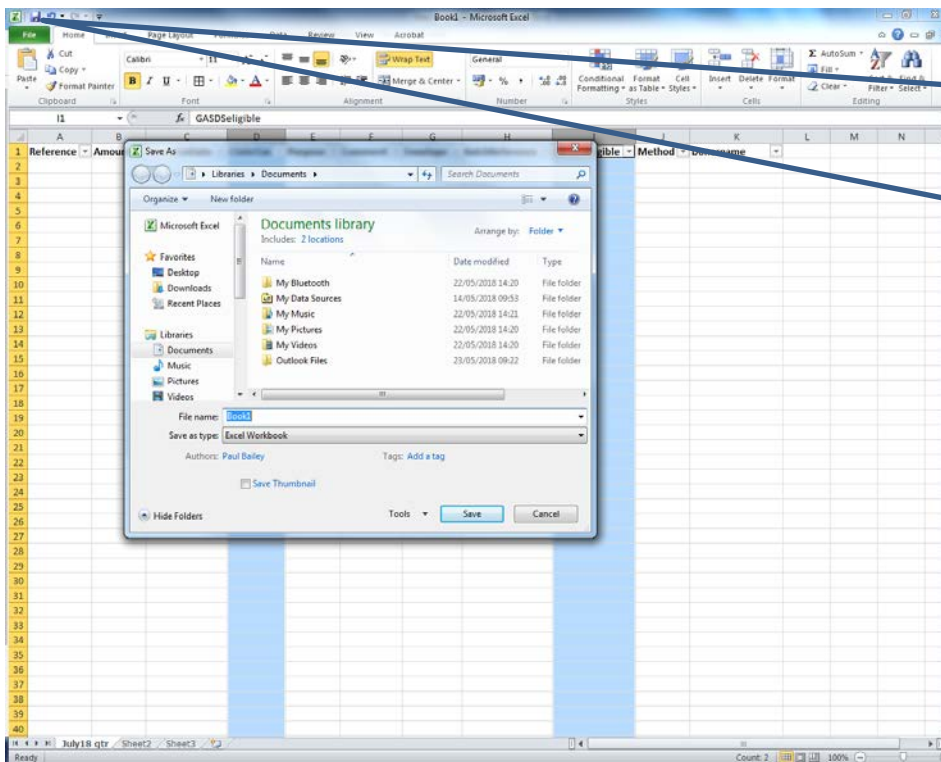
- Step 12

To record whether your donations are eligible for Gift Aid or GASDS you'll need to enter either Y or N in the cells for each donor/donation.

- Step 13
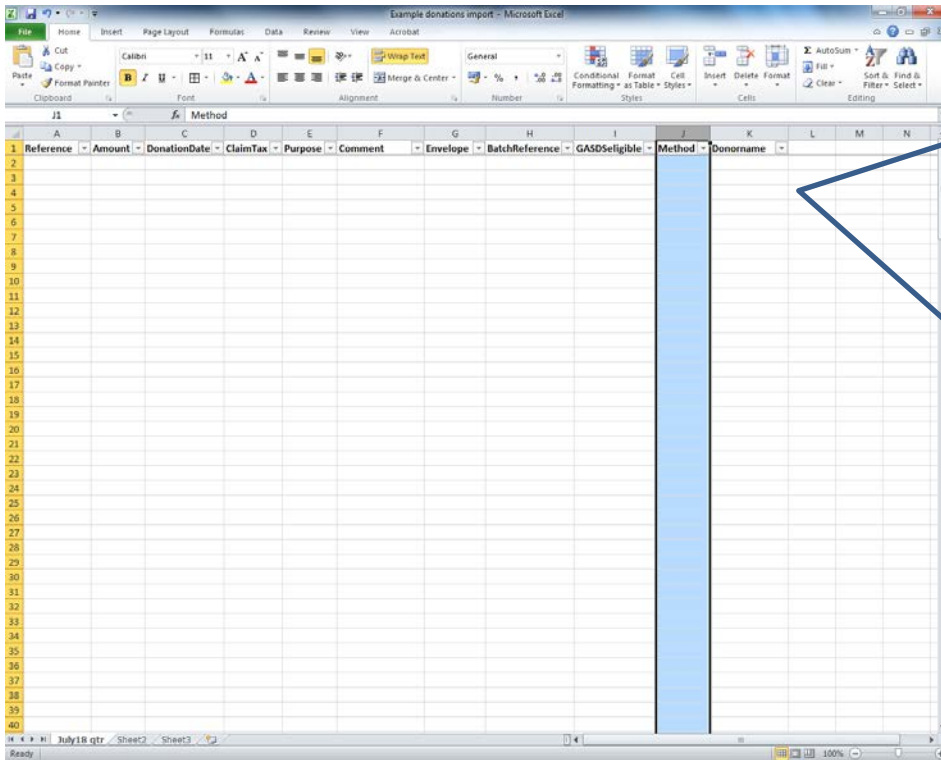
When entering the Method of donation please ensure you use the same wording as used in My Giving Online. When you start using the spreadsheet, have a list of the wording and abbreviations used by your keyboard as you complete your data entry. The spreadsheet will remember the Methods used after you have entered it for the first time.

- Step 14

Click on Save or File and Save. Choose a location, enter an appropriate file name (e.g. Donations to import 2018) and click on Save to store your changes.
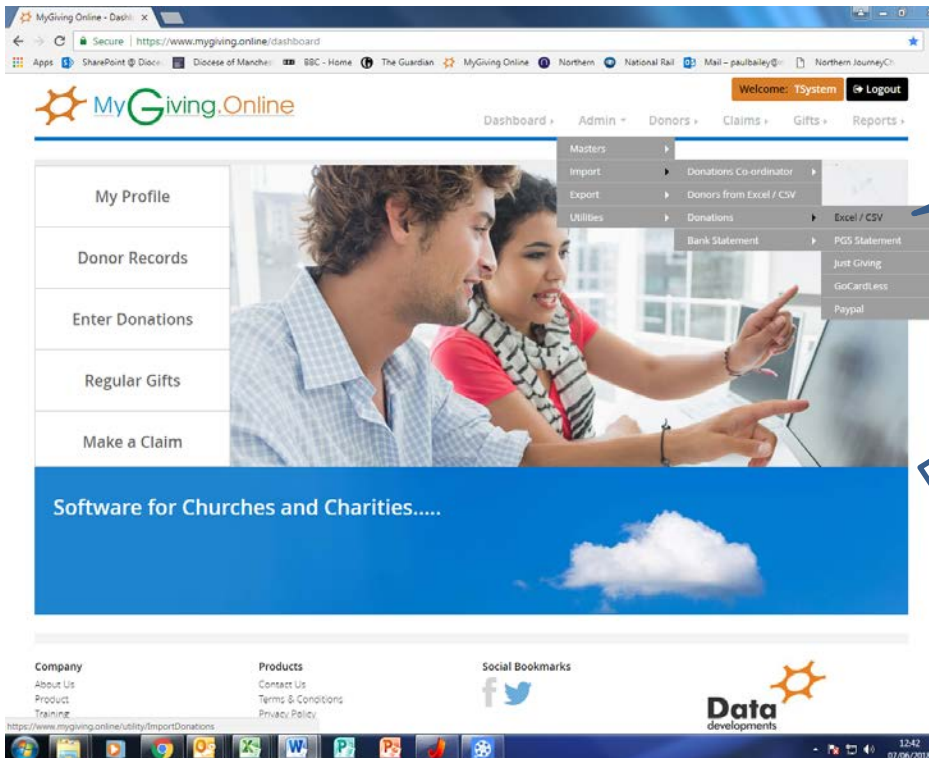
- Step 15

Your completed spreadsheet should look like this example.

A comment has been added, this could be a reference to a specific service.

A batch reference has also been added, for example Imp060618 (Imp for import and a date).

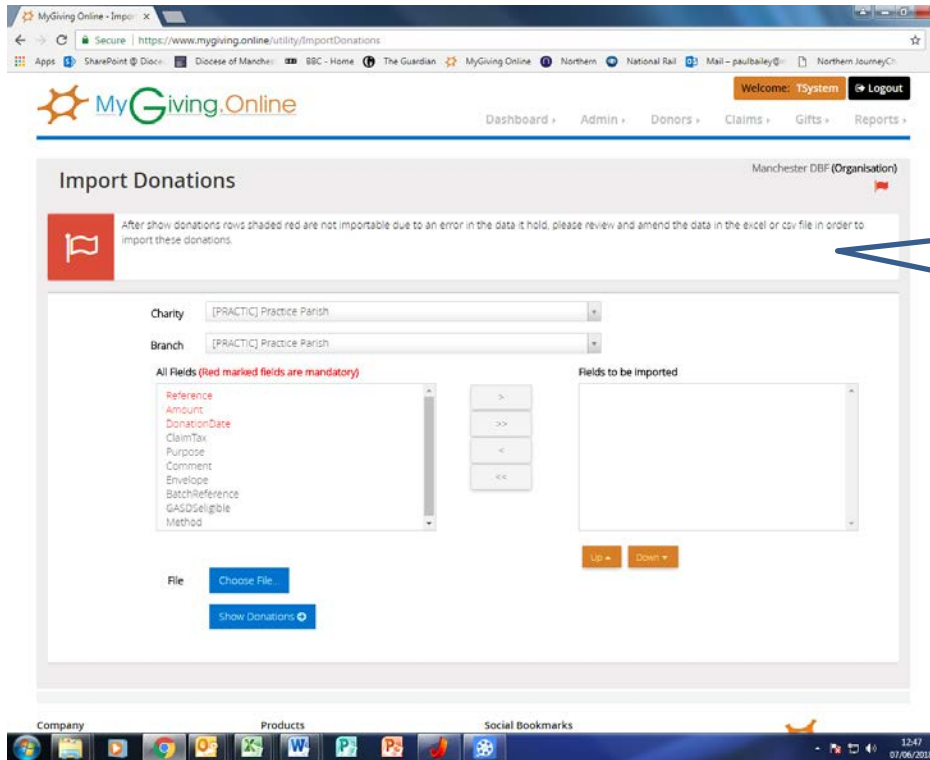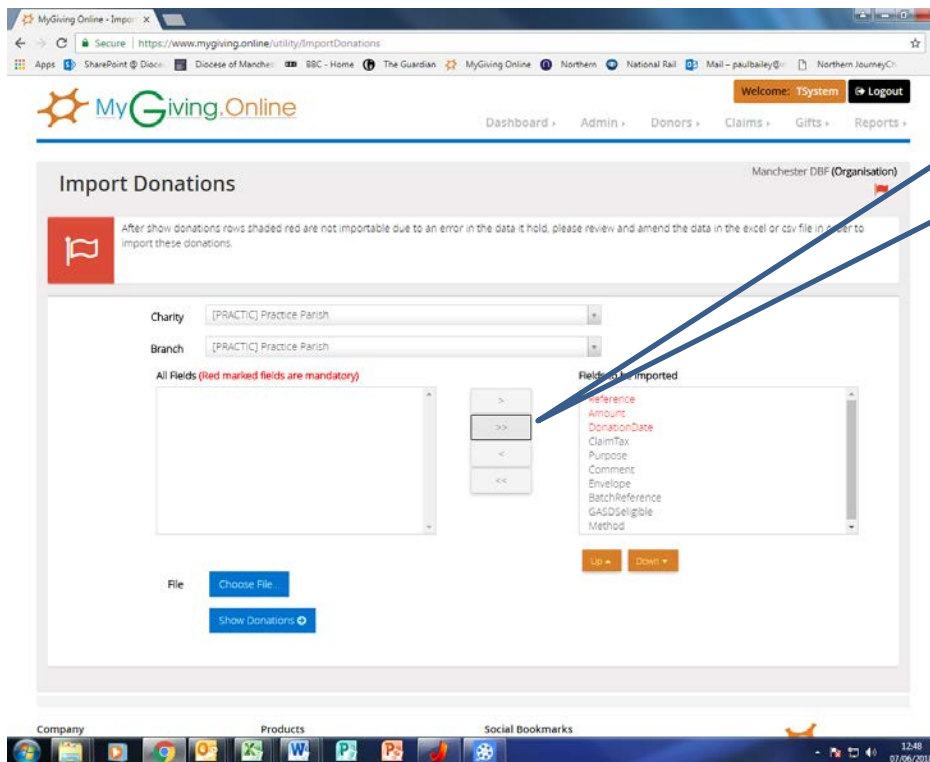2. Importing the spreadsheet into My Giving Online

- Step 1

Click on **Admin, Import, Donations and Excel/CSV**.

Please note, if a donor record does not exist to receive the donations you are importing, you'll need to create a record before proceeding.
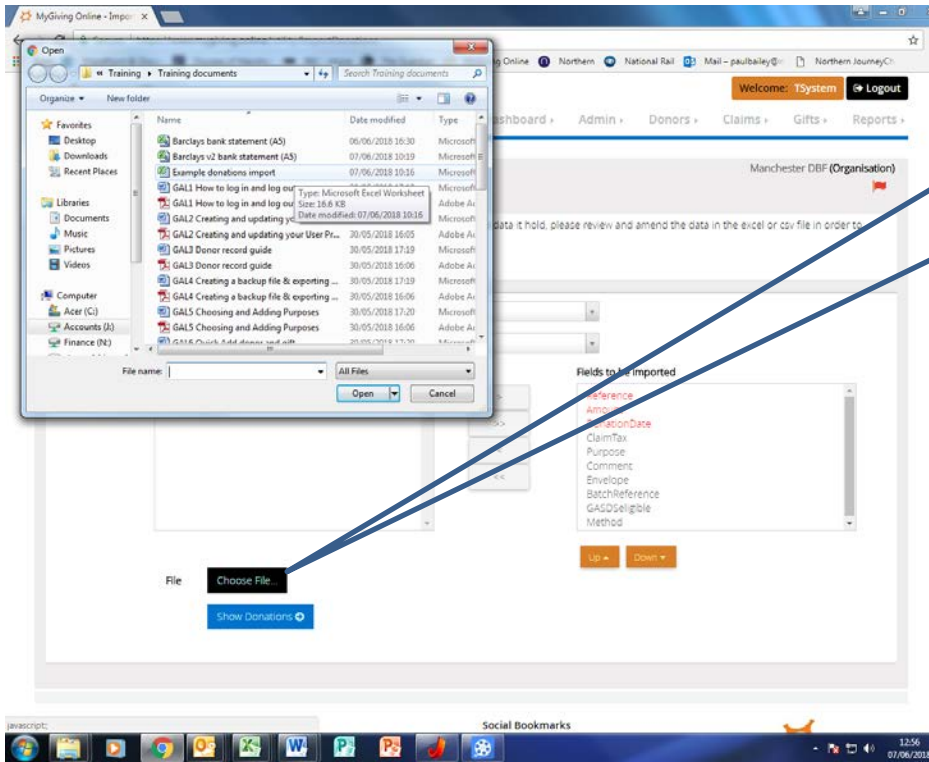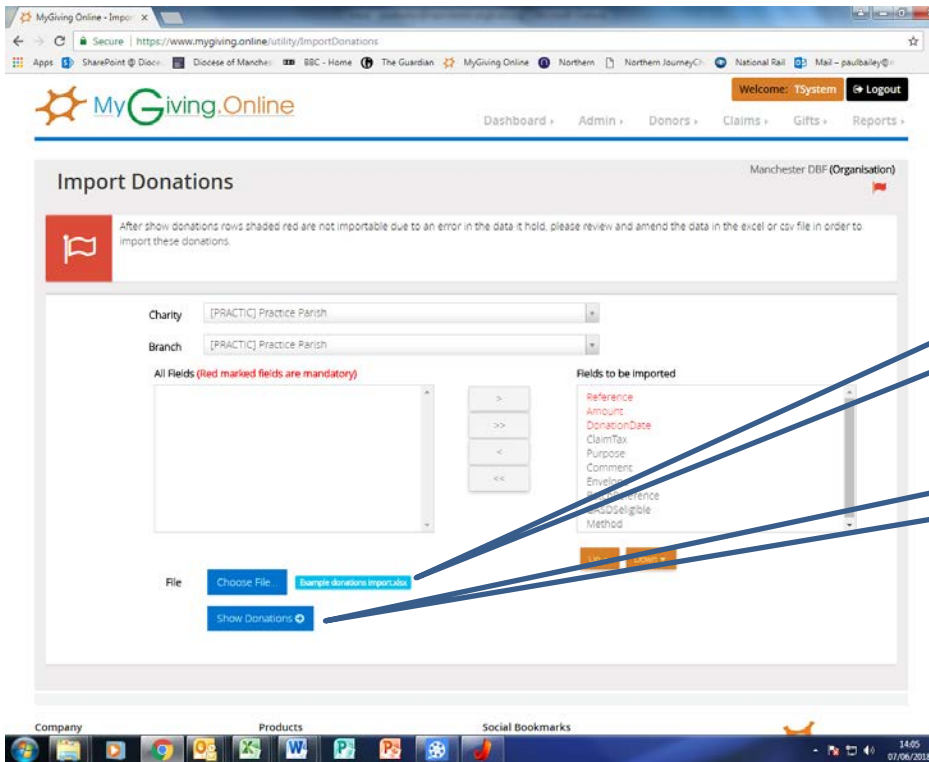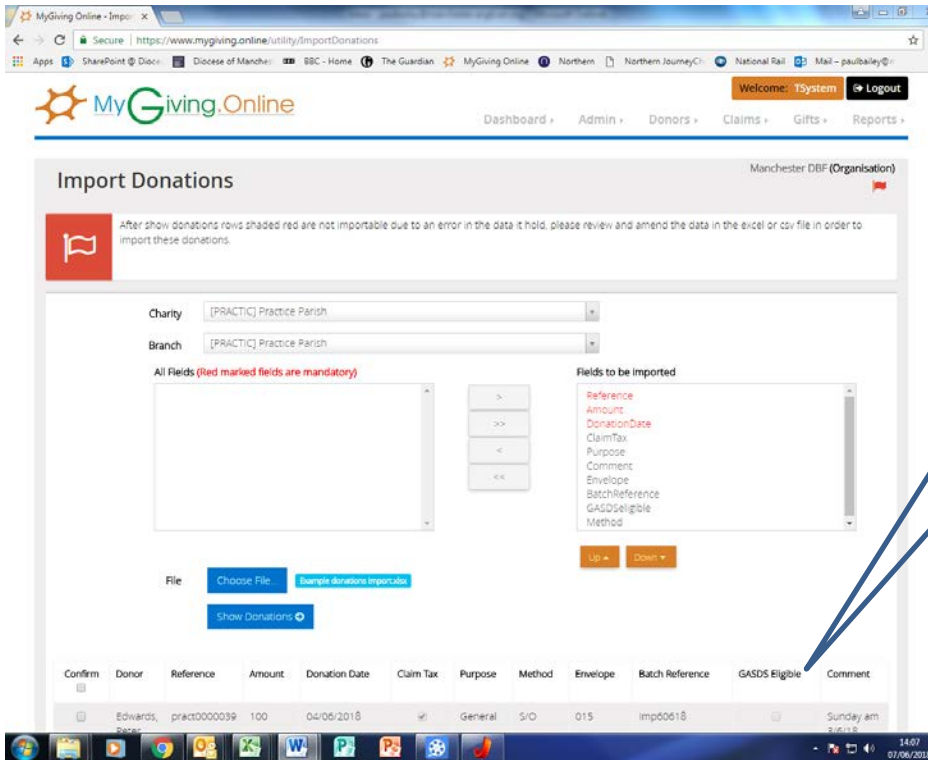
- Step 2

This window will appear on your screen.

- Step 3

Click on the >> button to transfer all the fields listed into the fields to be imported list.

- Step 4

Click on Choose File and the open file pop up will appear. Pick the file name you wish to use and click on Open.
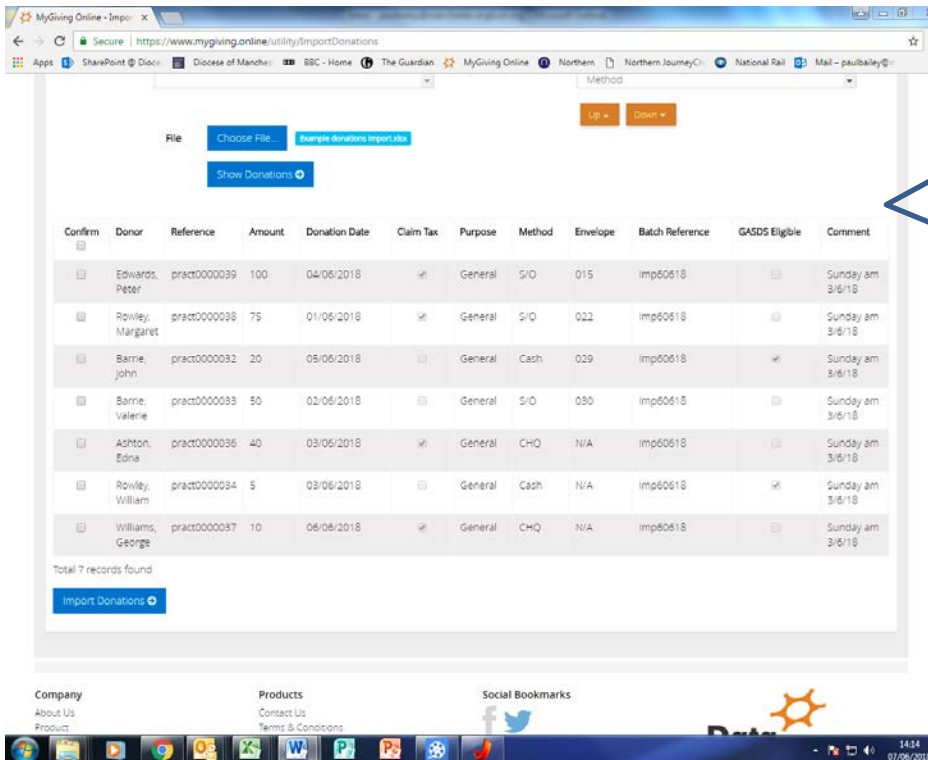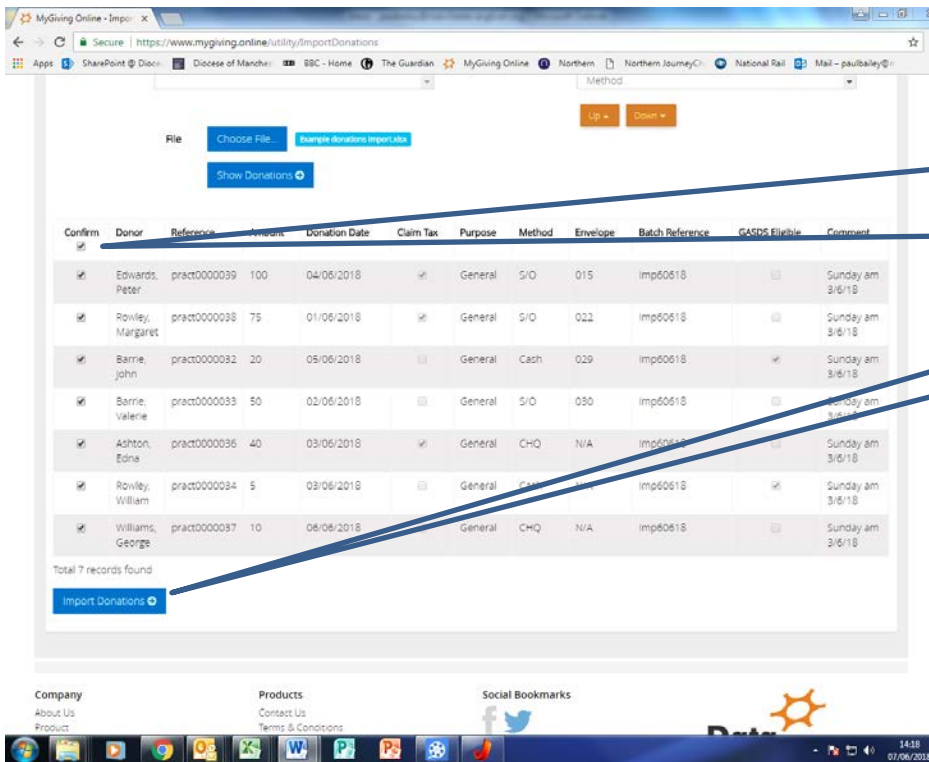
- Step 5

The file name will appear here.

Click on Show Donations.

- Step 6

The imported donations will appear at the bottom of the screen and you'll need to scroll down to view them.

- Step 7

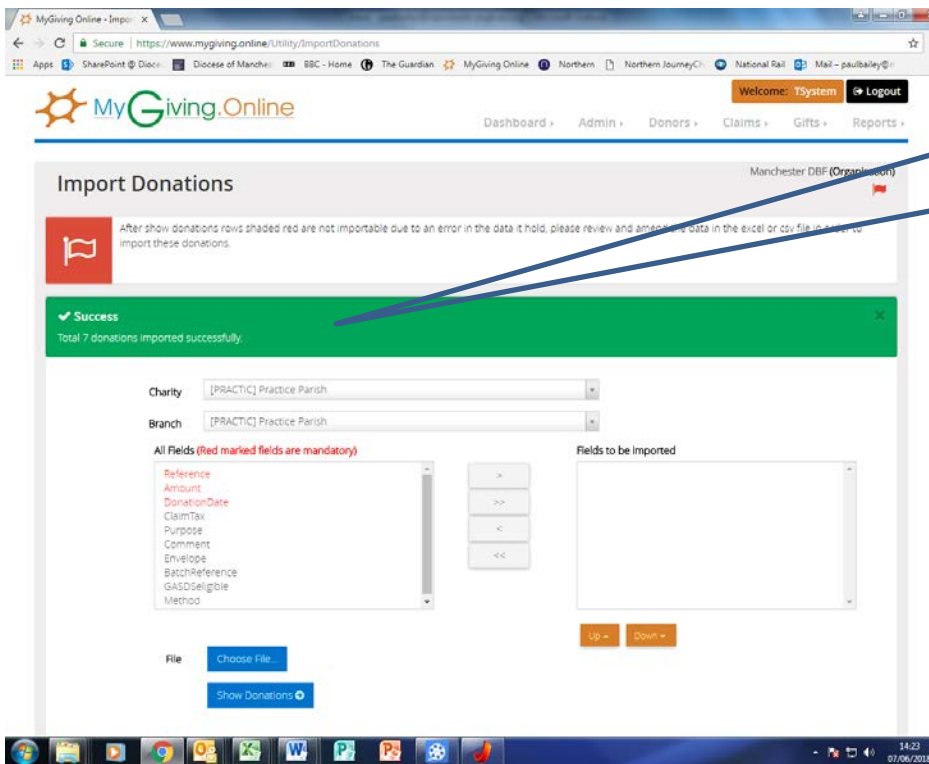Complete a quick of the data to ensure the information from the spreadsheet has been imported.

- Step 8

Tick the Confirm box(es) to approve the donations as being ready to import into My Giving Online.

Click on Import Donations.

- Step 9

A Success message will appear to confirm you have imported the donations.

- Step 10

Visit one of the donor records and you'll see the imported donation at the bottom of the screen.