

## GAL14 – Creating and managing regular donations

Encouraging your donors to make a regular donation is a great way to have a forecastable income stream for your Church, and could also help to increase your income. This guide is designed to be used with Standing Order donations only; with other regular donors (e.g. users of weekly envelopes) other methods of donation recording are more appropriate.

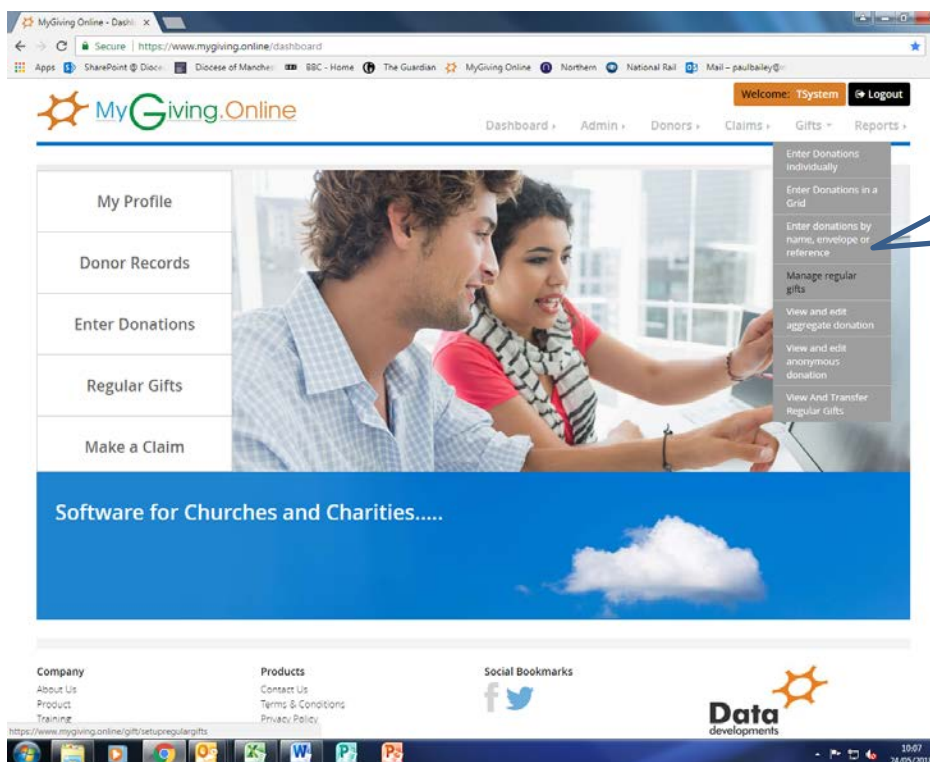
If you have an existing regular donor, or have recruited a new one, it is easier to enter the donation details once using the tool in My Giving Online. This enables you to record the basic details of the donation to set the regularity of the gift (e.g. weekly, monthly etc.) and save it. Once the donation becomes due, you can amend the donation amount, method and purpose (if required) and transfer it to the donor's record.

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

1. Creating a new regular donation
2. Transferring regular donations to donor records

1. Creating a new regular donation

1. Step 1



## 2. Step 2

MyGiving Online - Setup | X  
Secure | https://www.mygivingonline.org/gift/setupregulargifts

MyGiving Online  
Dashboard | Admin | Donors | Claims | Gifts | Reports | Manchester DBF (Organisation)

Manage regular gifts

Add New +

Edit regular gift

Organisation: Manchester DBF  
Charity: Practice Parish  
Branch: Practice Parish  
Donor: Barrie, Valerie  
Purpose: General  
Method: Standing Order  
Type: Monthly  
Amount: £ 50.00

Start Date: 20/05/2018  
End Date:   
Claim Tax:   
Eligible for GASDS:   
Envelope: 030  
Comment:   
Most Recent: 20/06/2018

Save Cancel

Filter: [PRACTIC] Practice Parish [PRACTIC] Practice Parish

Search:  Exact Match Show 10 entries

| Select                   | Donor Name      | Type    | Start Date | End Date | Amount | Claim Tax | GASDS | Purpose | Most Recent | Envelope # |
|--------------------------|-----------------|---------|------------|----------|--------|-----------|-------|---------|-------------|------------|
| <input type="checkbox"/> | Barrie, Valerie | Monthly | 20/05/2018 |          | 50.00  | Yes       | No    | General | 20/06/2018  | 030        |

This screen will appear.

Click on Add New to add a regular gift.

As shown below, if you scroll down the screen you will see your current regular donors.

MyGiving Online - Setup | X  
Secure | https://www.mygivingonline.org/gift/setupregulargifts

MyGiving Online  
Dashboard | Admin | Donors | Claims | Gifts | Reports | Manchester DBF (Organisation)

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| Select                   | Donor Name      | Type    | Start Date | End Date | Amount | Claim Tax | GASDS | Purpose | Most Recent | Envelope # |
|--------------------------|-----------------|---------|------------|----------|--------|-----------|-------|---------|-------------|------------|
| <input type="checkbox"/> | Barrie, Valerie | Monthly | 20/05/2018 |          | 50.00  | Yes       | No    | General | 20/06/2018  | 030        |

Showing 1 to 1 of 1 entries Previous 1 Next

Delete Selected Regular Gifts View and transfer regular gifts

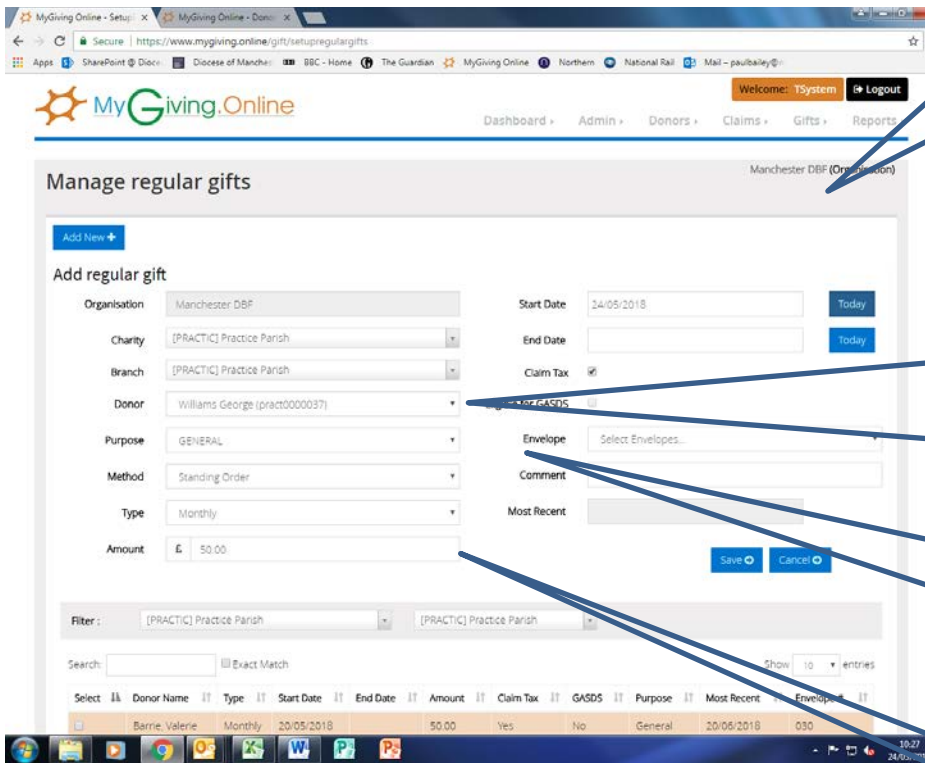
Company: About Us, Product, Training  
Products: CONTACT, Terms, Conditions, Privacy Policy  
Social Bookmarks: f, t  
Data developments  
Copyright 2018 Data Developments. All Rights Reserved  
Registered address: Data Developments (UK) Ltd, University of Wolverhampton Science Park, Giesher Drive Wolverhampton WV10 9TG  
Legal | Privacy | Security | www.mygivingonline

If you click on one of your regular donors their details will appear further up the screen.

If you need to delete the regular gift, select the donor record(s) by ticking the box.

Then click on Delete Selected Regular Gifts.

### 3. Step 3

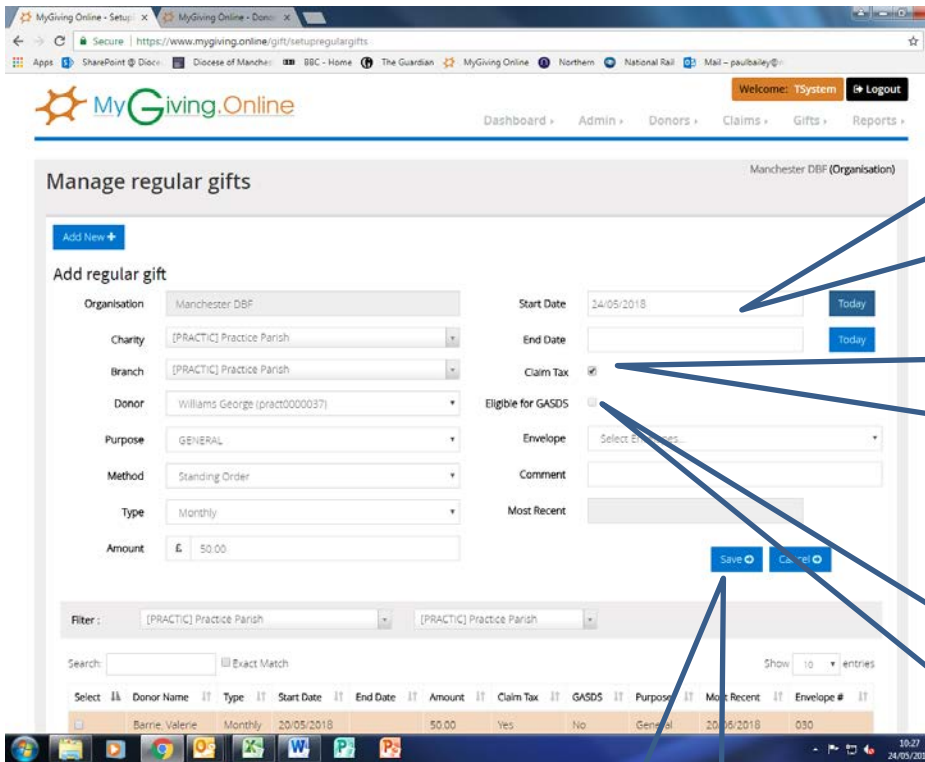


Once you have clicked Add New, enter the details of the regular gift.

Choose the name of the donor from the drop down list. If a new donor, you'll need to create a new donor record first.

Choose the Purpose, Method, Type and Envelope for the gift.

Enter the donation amount.



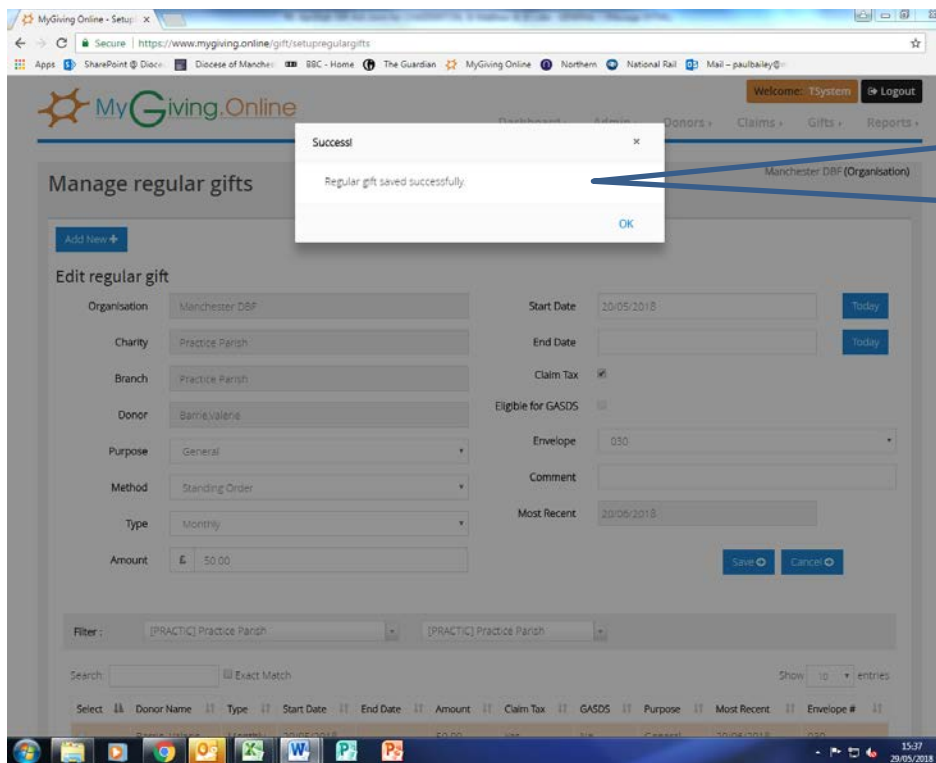
Enter the Start Date for the gift. If this is cancelled in the future you'll need to enter an End Date.

If your donor has a valid Gift Aid Declaration the Claim Tax box will pre-ticked.

If the donation is made using cash and is less than £20, you can tick the Eligible for GASDS box.

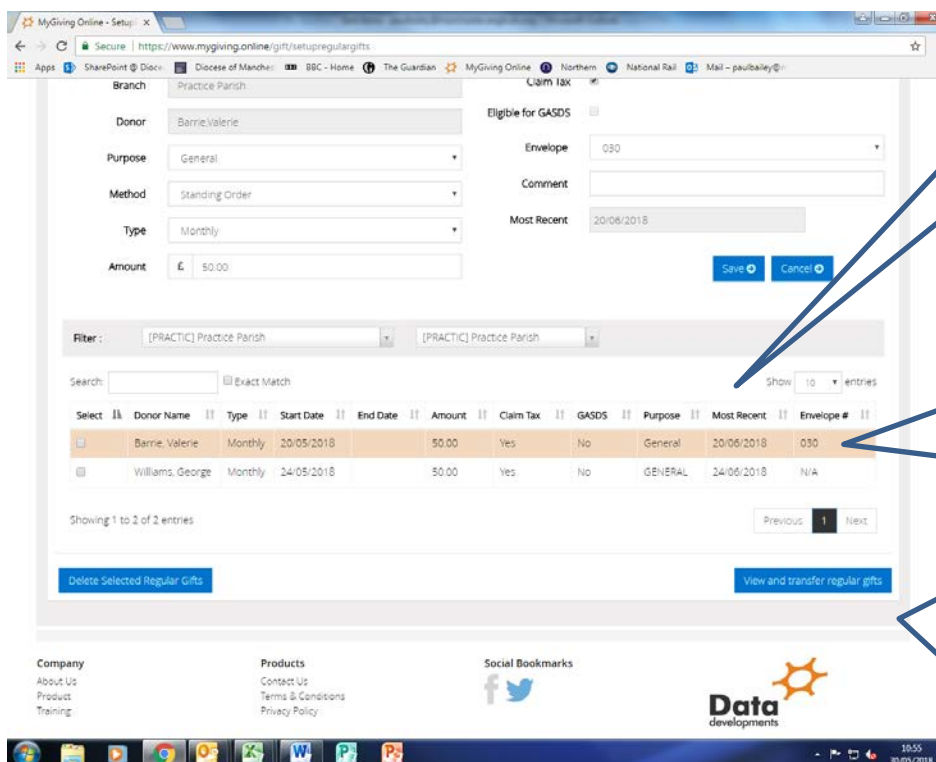
Click on Save to store your changes.

#### 4. Step 4



A pop up window will appear confirming you have saved it successfully.

#### 5. Step 5



Scroll down to the bottom of the page to see the regular donations you have entered.

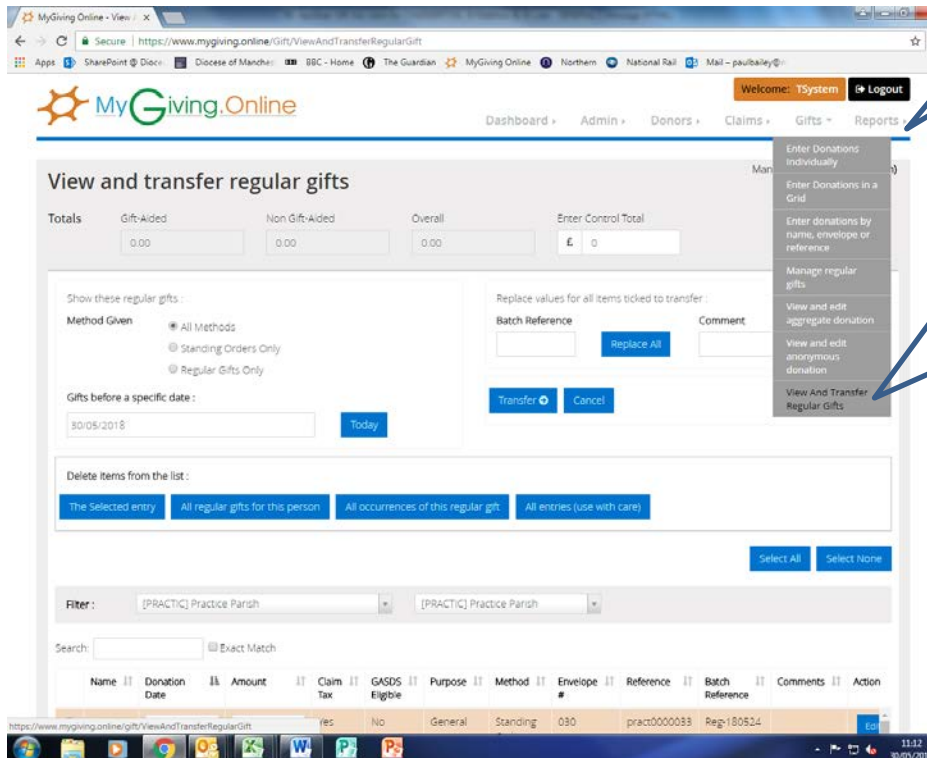
Click on a donation here and you can edit the gift in the top half of the screen.

When you are happy with the donations, you can click on View and transfer regular gifts to save the donations to a donor's record.



## 2. Transferring regular donations to donor records

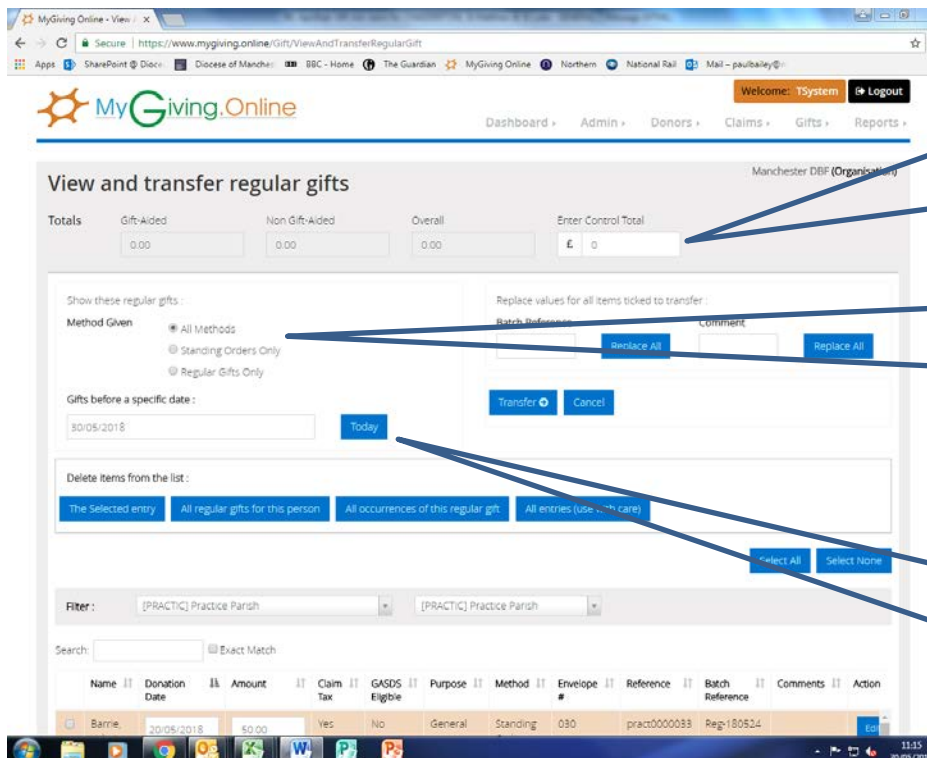
- Step 1



This screen will appear.

You can also go straight to this screen by clicking on Gifts and View and Transfer Regular gifts.

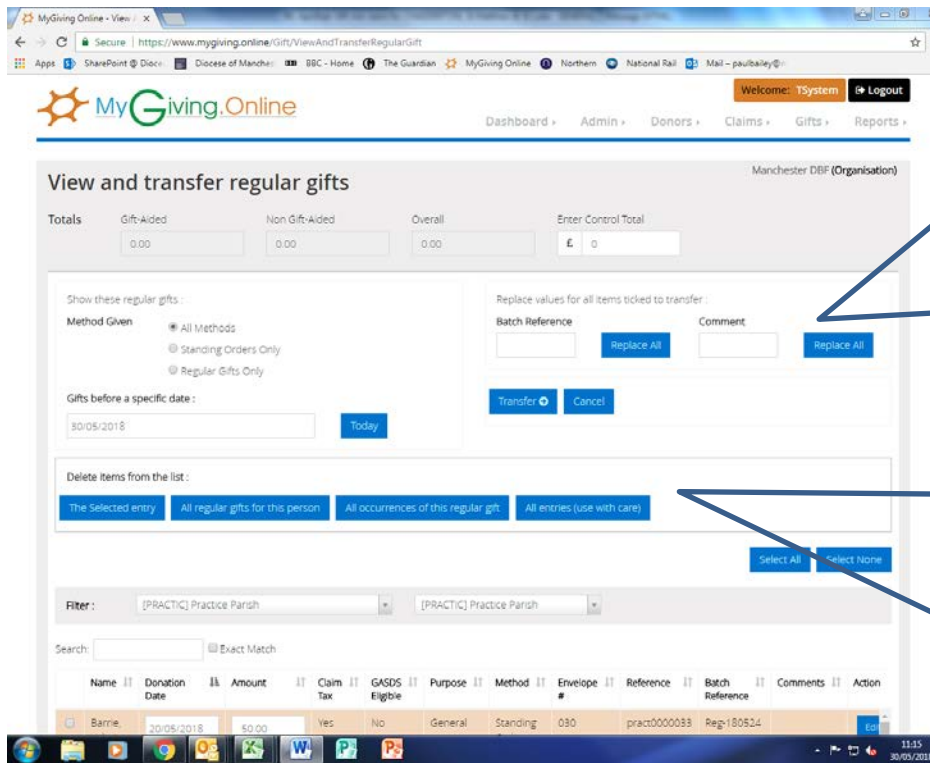
- Step 2



Enter in a Control Total for the amount of regular donations you'll be transferring.

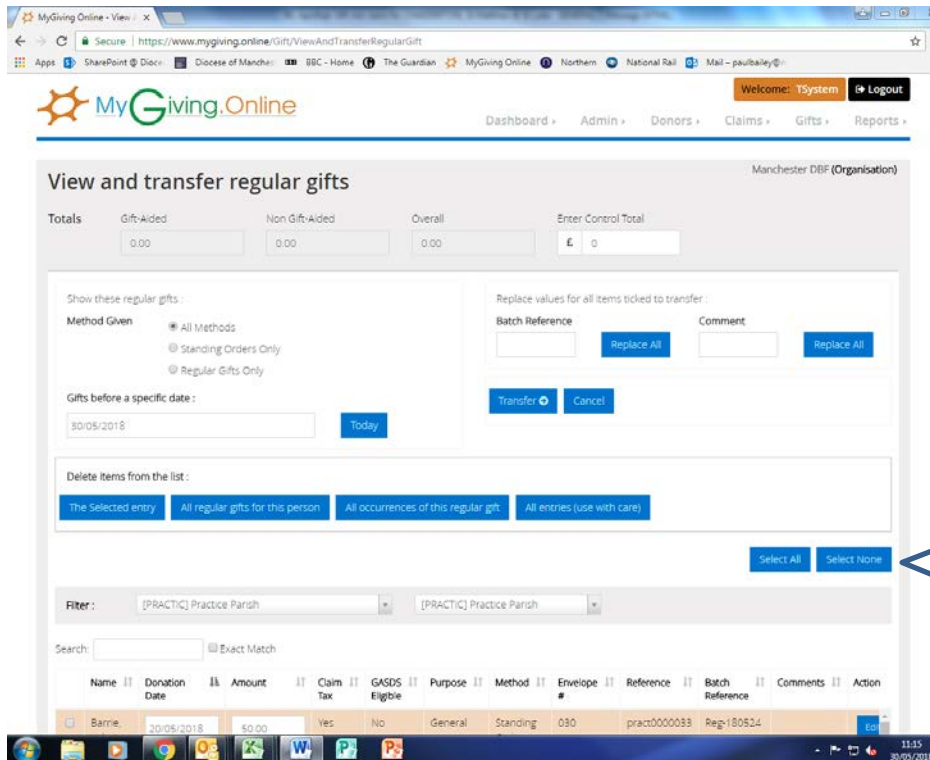
Choose the Method used by your donors you'd like to see in the bottom half of the screen.

You can also pick the gifts you can see before a specific date, or today's date.

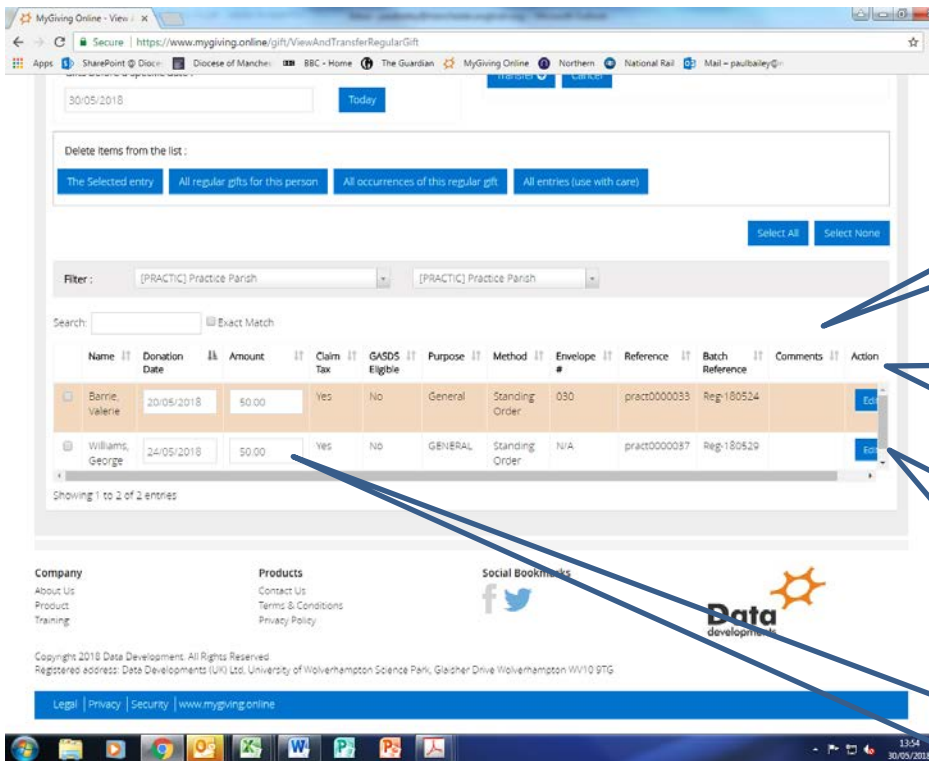


A Batch Reference and Comment can be added here before you transfer the donations. Clicking Replace All adds the same Batch Reference or Comment to all the donations.

If you tick to select chosen records from the bottom of the screen, you can choose to delete the selected entry, all regular gifts for this person, all occurrences of this regular gift or all entries for your Church.



Two options are also provided to Select All or Select None.



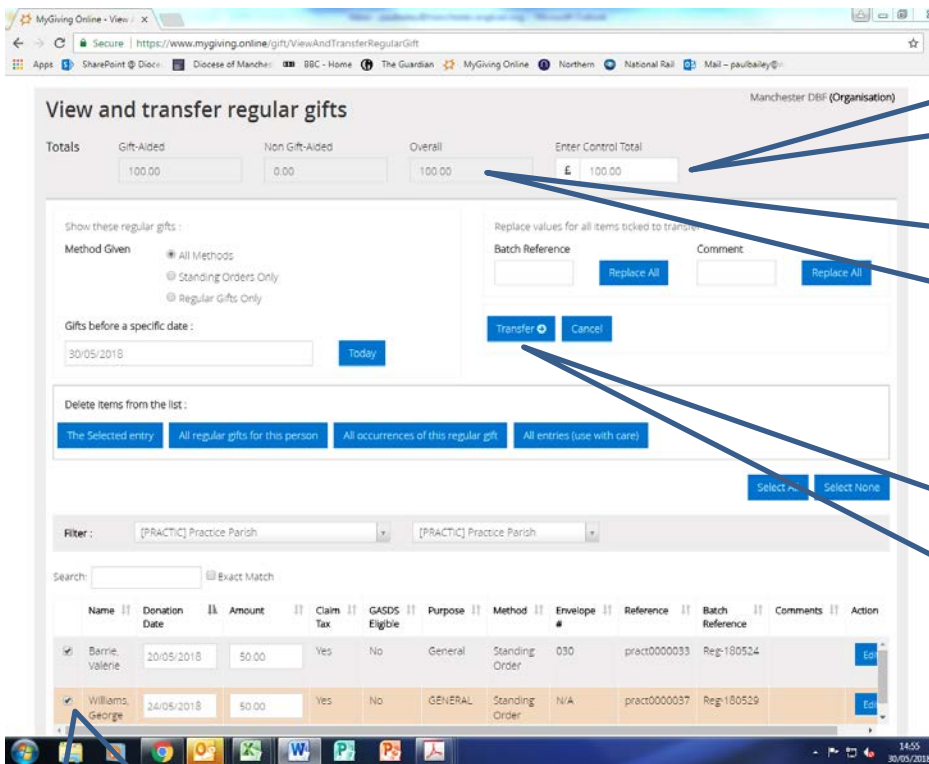
At the bottom of the screen are the details of the regular donors for your Church.

Each of the columns can be sorted alphanumerically.

Click on Edit to amend the details of the specific regular gift.

The donation date and amount can be changed by typing into the boxes.

• Step 3



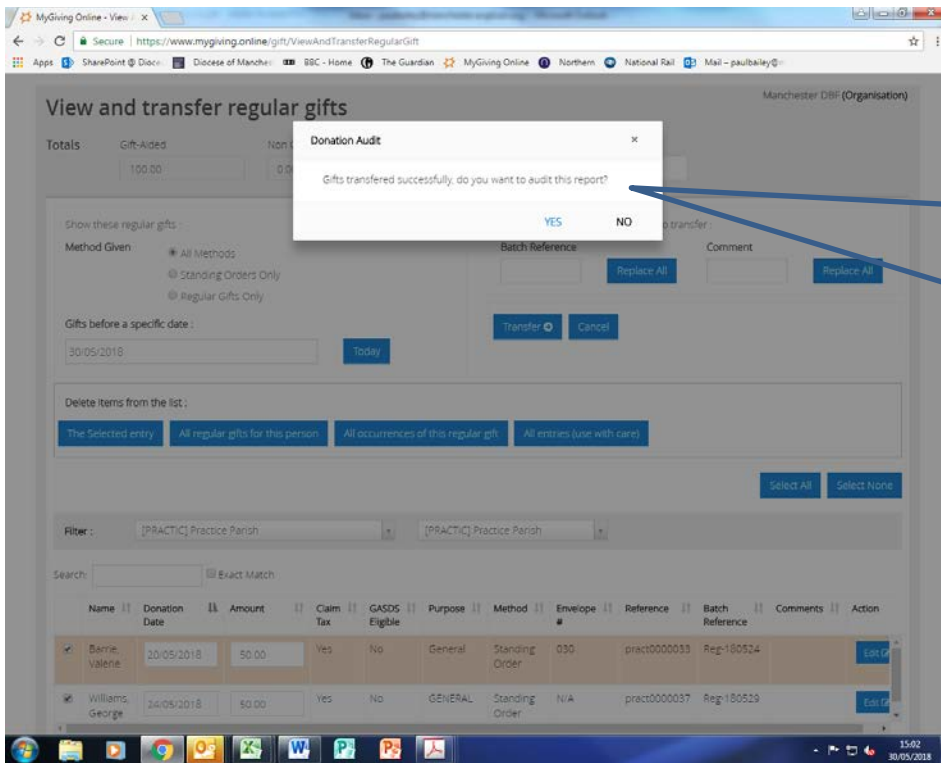
Ensure a Control Total has been entered.

Once the donations have been ticked they will be added to your Overall total.

As long as the Overall donations match your Control Total, you'll be able to click on the Transfer button.

Tick to select the donations you'd like to enter and transfer to a donors' records.

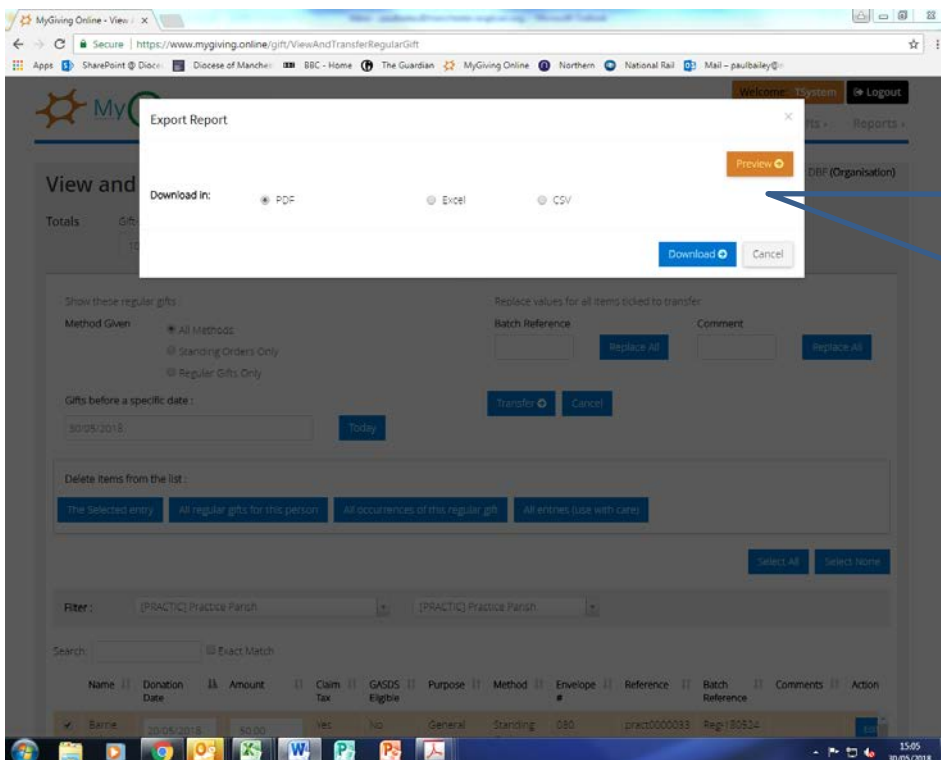
- Step 4



A pop up screen will appear to ask if you'd like to produce an audit report for these donations.

Click on Yes.

- Step 5



A pop up screen will appear to ask if you'd like to Download or Preview the report.

Click on Preview.



- Step 6

The screenshot shows a PDF report titled "Donations 30 May, 2018". The report contains a table with the following data:

| Name and reference             | Amount                   | Donation Date | Purpose             | Method         | Claim Gift Aid?     | Envelope | Batch ref               |
|--------------------------------|--------------------------|---------------|---------------------|----------------|---------------------|----------|-------------------------|
| Maria Barle - pract0000033     | 50.00                    | 20 May 2018   | General             | Standing Order | True                |          | Reg-180524              |
| George Williams - pract0000037 | 50.00                    | 24 May 2018   | GENERAL             | Standing Order | True                |          | Reg-180529              |
| <b>Totals :</b>                | <b>Gift Aid : 100.00</b> |               | <b>Gesds : 0.00</b> |                | <b>Other : 0.00</b> |          | <b>Overall : 100.00</b> |

The report footer indicates it is page 1 of 1, dated 30 May 2018 3:09 pm.

A copy of the audit report will open in a new window. We recommend you print out a copy for your records.

- Step 7

The screenshot shows the "View and transfer regular gifts" interface. At the top, there are summary statistics: Totals, Gift-Aided (0.00), Non Gift-Aided (0.00), Overall (0.00), and an "Enter Control Total" field with a value of £ 0. A green success message states "Gift transferred successfully". Below this, there are options to "Show these regular gifts" (All Methods, Standing Orders Only, Regular Gifts Only) and "Replace values for all items ticked to transfer" (Batch Reference, Comment). There are also buttons for "Transfer" and "Cancel". A "Delete items from the list" section includes buttons for "The Selected entry", "All regular gifts for this person", "All occurrences of this regular gift", and "All entries (use with care)". A filter dropdown is set to "[PRACTIC] Practice Parish". At the bottom, a table header is visible with columns: Name, Donation Date, Amount, Claim Tax, GASDS Eligible, Purpose, Method, Envelope #, Reference, Batch Reference, Comments, and Action. The table currently contains no data.

A message will appear on your screen to confirm you have successfully transferred the gifts.

The donations which had appeared at the bottom of the screen are no longer there. The donations will not appear here again until the date of their next donation has been reached.

- Step 8

The screenshot shows the 'MyGiving Online - Donor' interface. The donor's name is Mrs. Valerie Barrie, with reference number pract0000033. The donor type is set to 'Weekly'. The 'Gifts' tab is active, displaying a table of transactions.

| Date       | IF | Amount (£) | Claim Tax | GASDS | Envelop # | Method         | Purpose | Comment | Claimed | Claim Start | Claim End | B R |
|------------|----|------------|-----------|-------|-----------|----------------|---------|---------|---------|-------------|-----------|-----|
| 20/05/2018 |    | 50.00      | Yes       | No    | N/A       | Standing Order | General |         |         |             |           | R   |
| 09/05/2018 |    | 10.00      | Yes       | No    | 030       | Envelope       | General |         |         |             |           | G   |
| 02/05/2018 |    | 30.00      | Yes       | No    | 030       | Envelope       | General |         |         |             |           | Z   |

In the donor's record you'll be able to see the regular gift has now been added.