



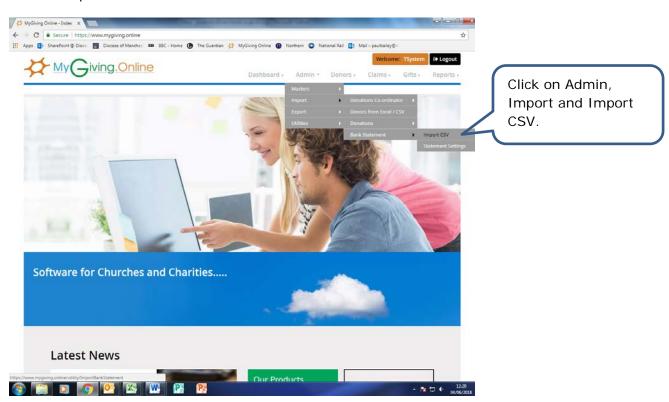
# GAL17 – Importing donations directly from an electronic bank statement

My Giving Online provides a facility to import your donations directly from an electronic bank statement. This presumes you have such a function set up with your bank, if not, it will not work.

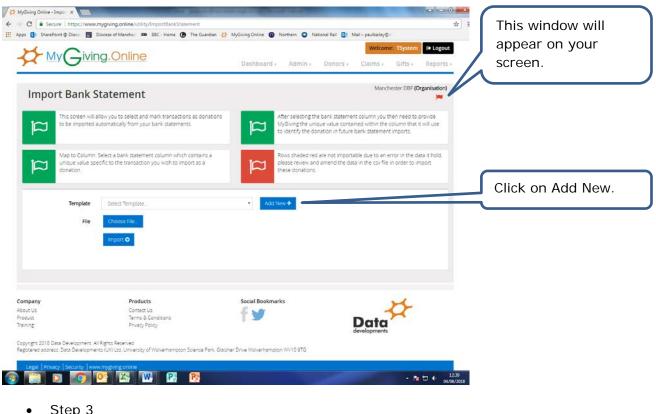
There are three stages to get this up and running. For example, the first time you use it, and if you need to set up more than one bank account, you'll need to create a bank statement template to facilitate the import process. Afterwards you'll need to match the imported columns to those used by My Giving Online. The first time a donor appears on your bank statement you will need to match the details to their donor record in My Giving Online.

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

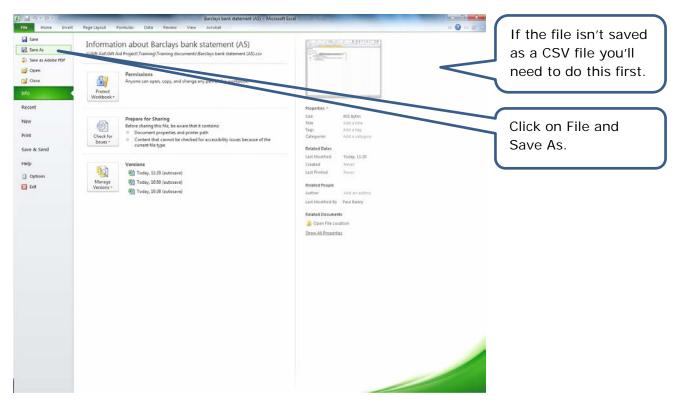
- 1. Creating a bank statement template
- 2. Importing the bank statement
- 3. Matching a name from the bank statement to a donor record
- 4. Adding a donor in advance of a bank statement arriving
- 1. Creating a bank statement template

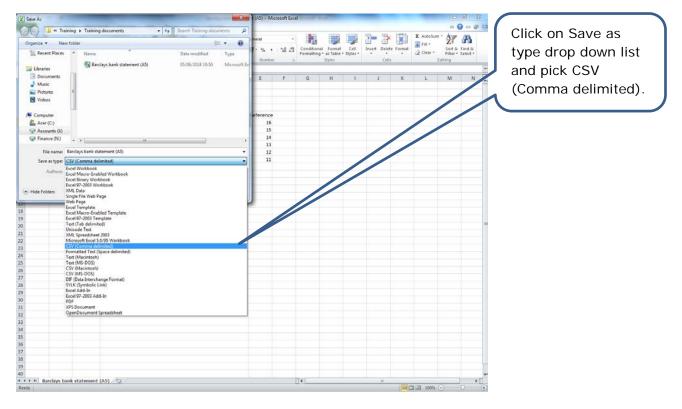


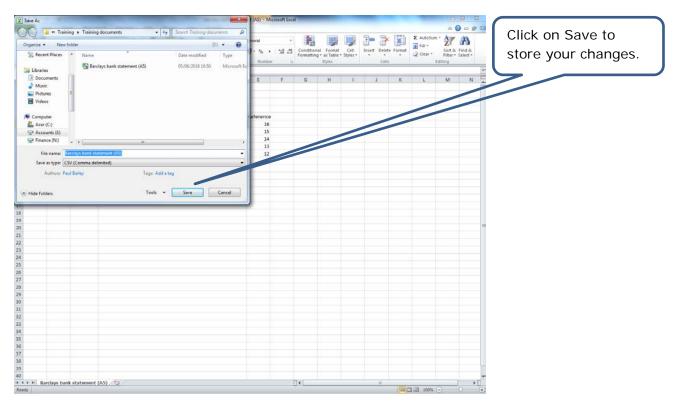
#### Step 2 ٠



Step 3







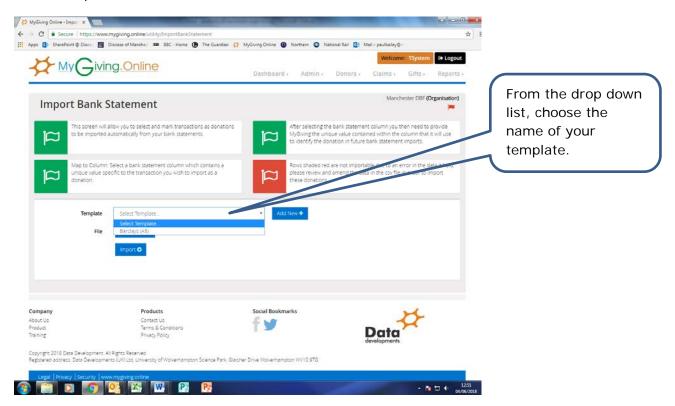
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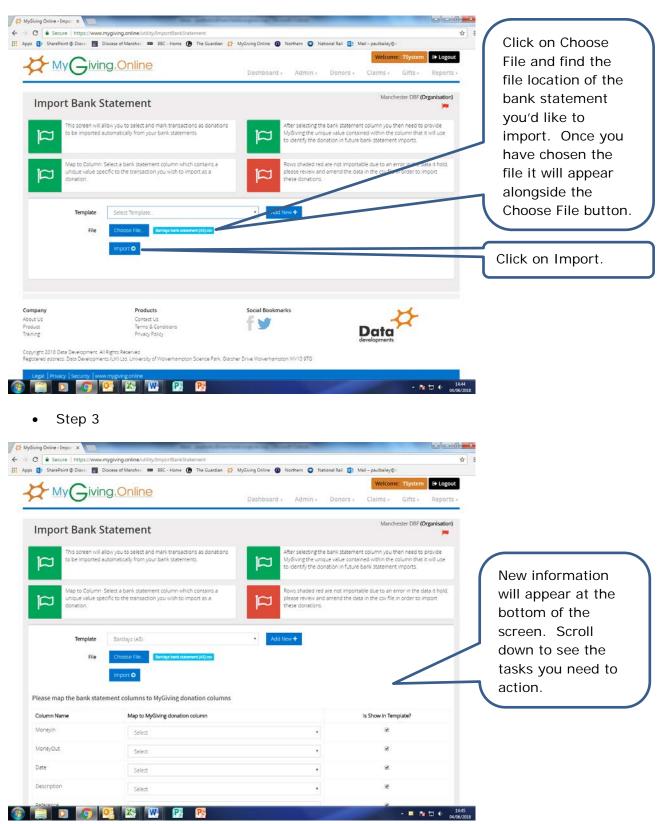
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This is the example bank statement used for this exercise. You'll see the cell reference where the transaction table starts is A5.

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- 2. Importing the bank statement
- Step 1

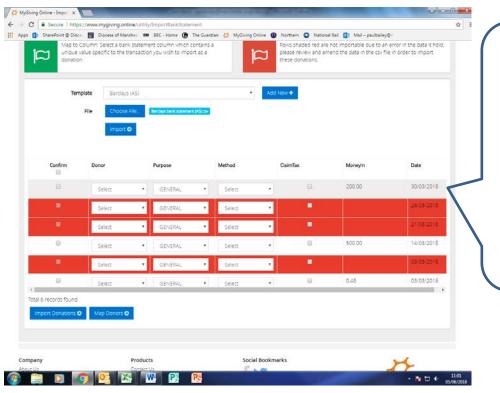




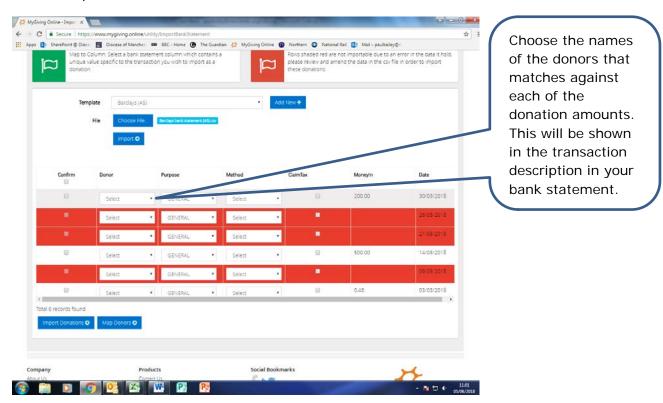
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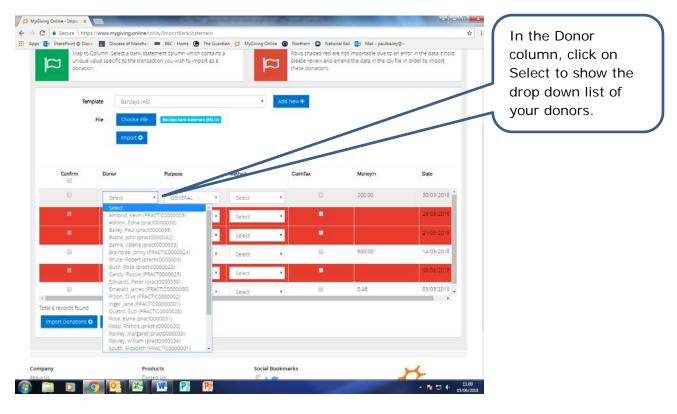
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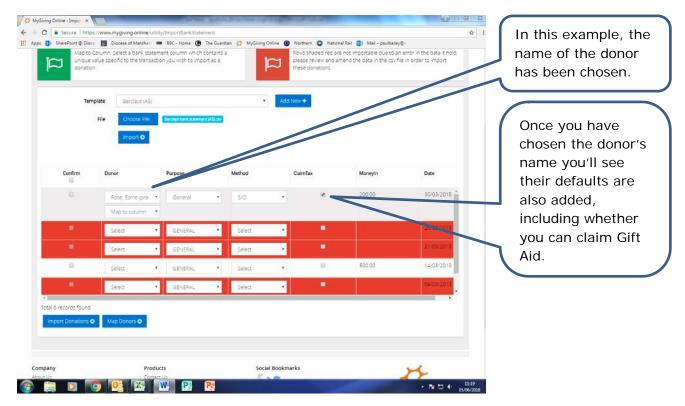
- 3. Matching a name from the bank statement to a donor record
- Step 1

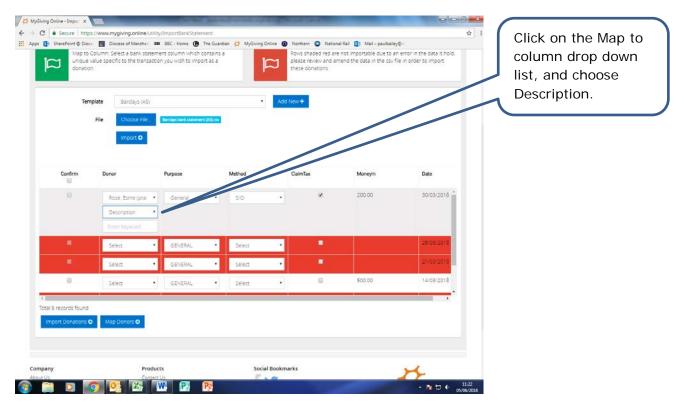


# If the donation details have been imported successfully you'll be able to see the donations amounts and dates. The relevant rows will be white in colour; if they all remain red the process hasn't worked properly.

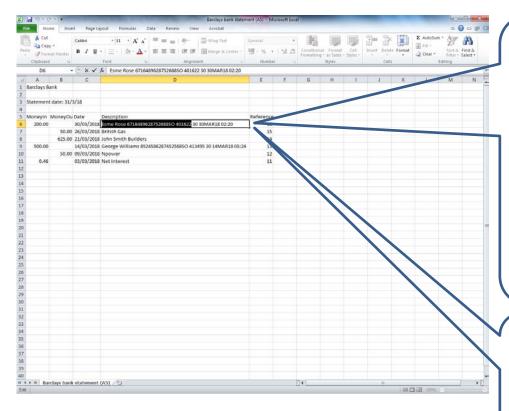








#### • Step 6



Open your bank statement spreadsheet and identify the information in the transaction description that will appear in all future monthly statements. For example, you won't need the date and time if this included.

Select the text as instructed and either right click on your mouse and choose copy, or press CTRL and C.

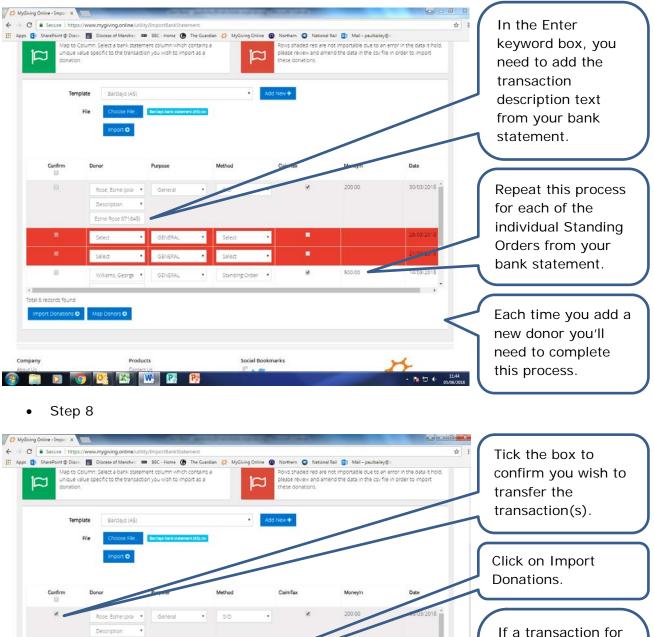
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Map Donors @

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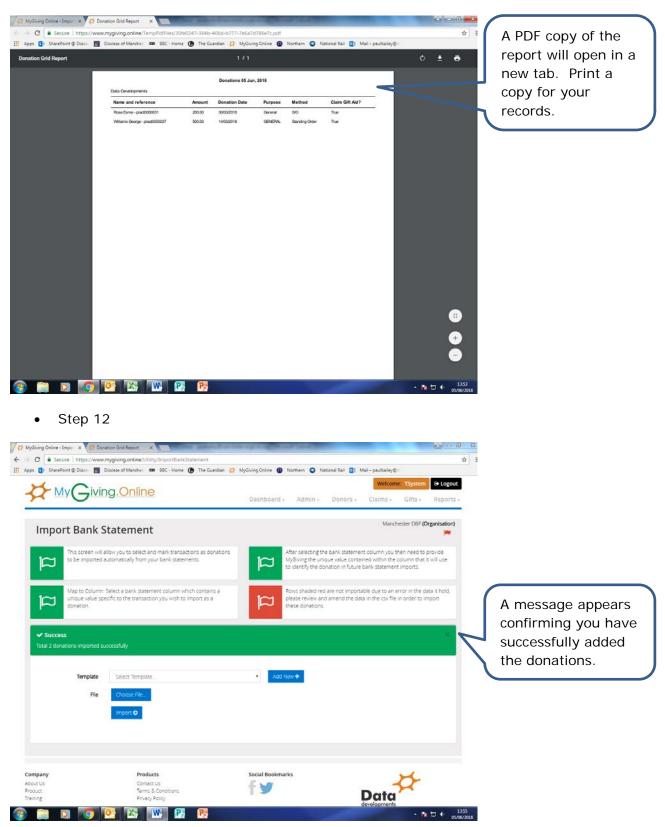
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If a transaction for one of your donors hasn't appeared yet on a statement, you can create this in advance by clicking on Map Donors (see below for instructions).

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An audit report can be printed out for your records by clicking on Yes.

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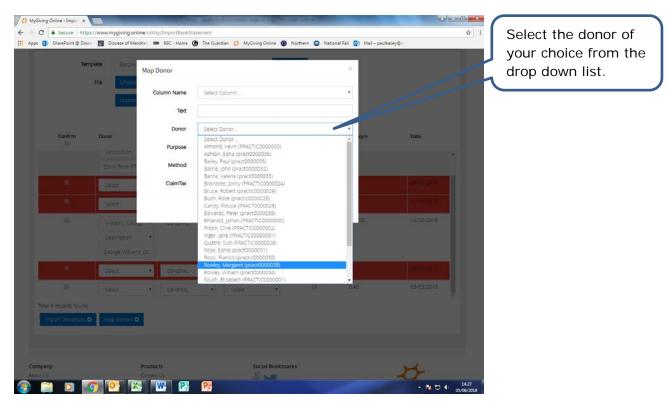


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- 4. Adding a donor in advance of a bank statement arriving
- Step 1

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	Esme Rose 67164	81					statement.
	Select	GENERAL	• Select	•		26/03/2018	
	Select	GENERAL	• Select	•		21/03/2018	Click on Map Dono
	Williams, George Description	GENERAL	Standing Order		500.00	14/03/2018	
	George Williams 89	9:					
	Select	• GENERAL	• Select	•		09/03/2018	
0	Select	GENERAL	* Select	0	0.46	03/03/2018	
lotal 6 records found							
Import Donations	Map Donors O						

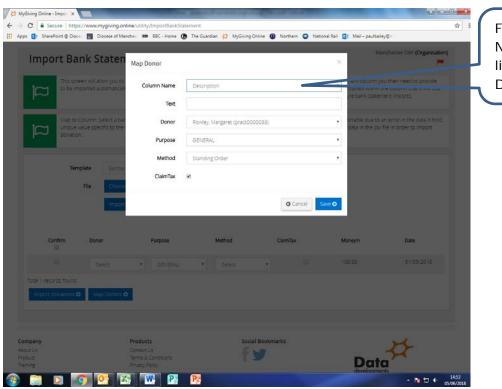
s 😰 SharePoint @ Dioce Tempi	ate Bartlay	p Donor	g me caso	ar <del>yr</del> nyanog		_				This pop up window will appear. See
Confirm UP N N N	File	Column Name Text Donor Purpose Method ClaimTax	Select C	onor irpose		© Cancel	y gyn y Sawe O	Date 26/02/2018 21 /13/2018 14/03/2018		below for the instructions on how to complete it.
	George Williams 89.			Town				TOWNTON		
		GENERAL GENERAL		1.544.68			0.46	03/03/2018		
Total 6 records found	Select								8	
Import Denations O	Map Donors O									
mpany		tucts act Us		Soc	ial Bookmar	ks		×		



Luce and	a Dank Chatra				Ma	whester DHF (Organisation)
Impor	rt Bank Stater	Map Donor			×	-
	This screen will allow you to to be imported automatical	Column Name 5	elect Column			u then need to provide he column that it will use ent imports:
		Text				
	Map to Column: Select a bai Unique value specific to the	Donor R	owley, Margaret (pract0000	2036)		n error in the data it hold. Ne in order to import
		Purpose	ENERAL	_		
		Method S	tanding Order		,	
	Template Barday	ClaimTax 😥				
	File Choose	65560/56621 (1355				
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Cont		Purpose	Method	ClaimTax	Moneyin	Date
		· GENERAL	* Select			
Total 1 record						
import Op	nations O Map Donors (	0				
		Products Contact Us	Social	Bookmarks		X
ompany Sout Us						

Once you have chosen a donor their defaults will be added in the Purpose and Method fields, and if appropriate the Claim Tax box will be ticked. You can change these if you wish.

• Step 5



From the Column Name drop down list, choose Description.

	oint⊕Dioce		街 The Guardian 🙀 MyGiving Onli	ne 😰 Northern 🙄 Natio		y©e Inchester DBF (Organisation)	In the Text field enter the details that will uniquely
а П	This screen will allow you to to be imported automatical Map to Columni Select a Bar unque value specific to the conacion. Template Barday File Choose	Column Name Text Donor Purpose Method ClaimTax	Description Margaret Rowley 6584369826 Rowley, Margaret (pract00000 GENERAL Standing Order		are bank statem	u then need to provide ne column that a will use ensimports. In error in the data it holds. Ne in order to import	identify the donor from a bank statement. This would usually be their name, account number
Cor	import	Purpose	Method	© Cancel S CarmTax	Ave O	Date	and sort code. Click on Save to
tal 1 recor	D Select ros found on atoms O Map Donors O	• GENERAL	• Seed			31/03/2018	store your changes
pany Us		Products Contact UT Terms & Conditions	Social E	ookmarks	Det	#	

Map to I	Column: Select a bank staten value specific to the transacti	nent column which con		Rows shaded red		an error in the data it hold,	You can then import your donations in the
Terr	Bardays (A5) File Choose File. Import O	Barcleys v2 bank statement	Add New +				usual way when your bank statement arrives.
Confirm	Donor	Purpose	Method	ClaimTax	Moneyin	Date	Choose a template,
	Rowley, Margare •	GENERAL	Standing Order	×	100.00	31/03/2010	the file containing
	Description •						the latest statemen
	Margaret Rowley 65						
	Ashton, Edna (pr 🔹	GENERAL	Standing Order	8	20.00	30/03/2018	and click on Import
	Description •						
	Edna Ashton 67843						
Total 2 records found	Map Donors O						
mpany lut Us dutt	Products Context Us Terms & Conditio		Social Bookmarks		*		

Map to C	Diocese of Manches olumn. Select a bank statem alue specific to the transaction	donor's donation will appear on the					
Ternş	Template Bardays (AS). File Choose File Renays of twee state Import O	Rarclays v2 bank statement (AS		id New 🕇			screen. You can change the Purpos and Method if needed.
Confirm	Donor	Purpose	Method	CaimTax	Moneyin	Date	
	Rowley, Margare •	GENERAL •	Standing Order •		100.00	31/03/2018	
	Description •						
	Margaret Rowley 65						
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tal 2 records found Import Donations O	Map Donors O						
any Us	Produ		Social Bookr	marks		×	