

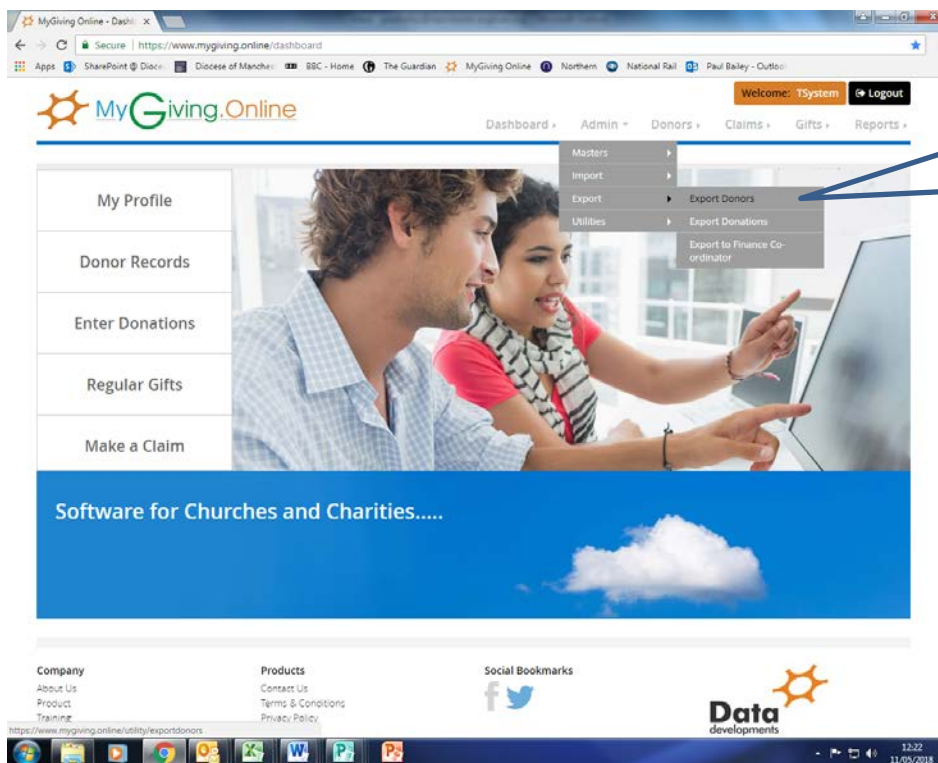
GAL4 – Creating a backup file/exporting donors and donations

If you have previously created a backup of your donor data using Donations Coordinator, please note there is no need to do this in My Giving Online. This is because the system automatically creates a backup for you.

If you wish need to export the details of your donors and their donations which are securely stored in My Giving Online you can do this. However, we do not recommend you this if these details are not securely stored. The new GDPR regulations which came into effect in May 2018 - need to be complied with if you are storing the data on your own systems.

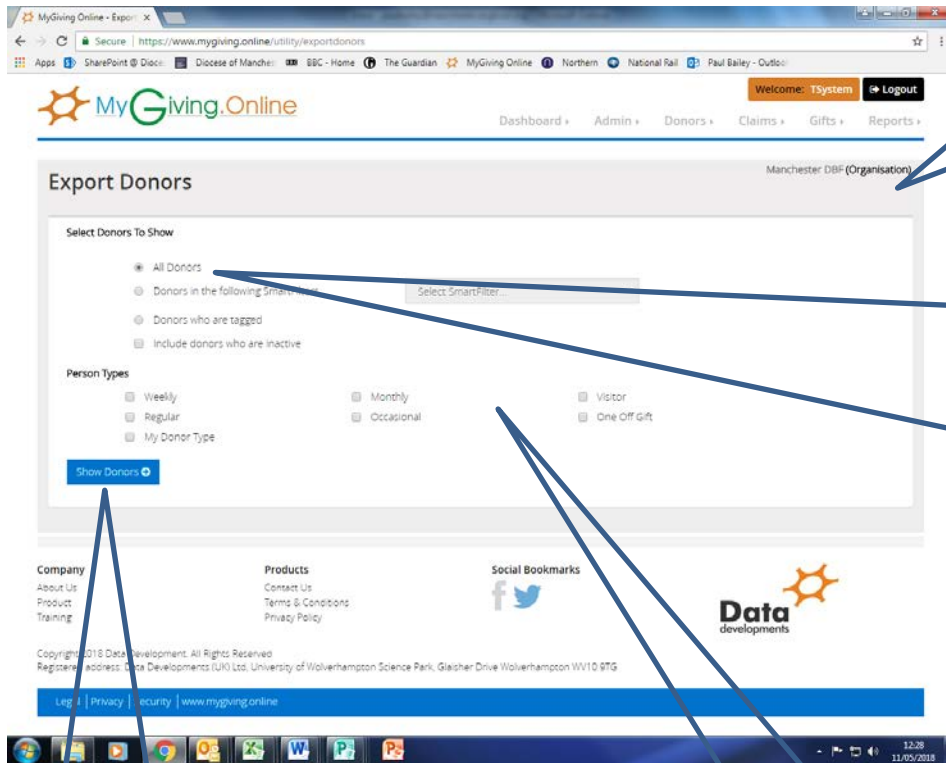
If you do wish to continue and create an export, please follow this guide which is split into two sections (Export Donors and Export Donations).

- Step 1



1. Exporting Donors

- Step 1



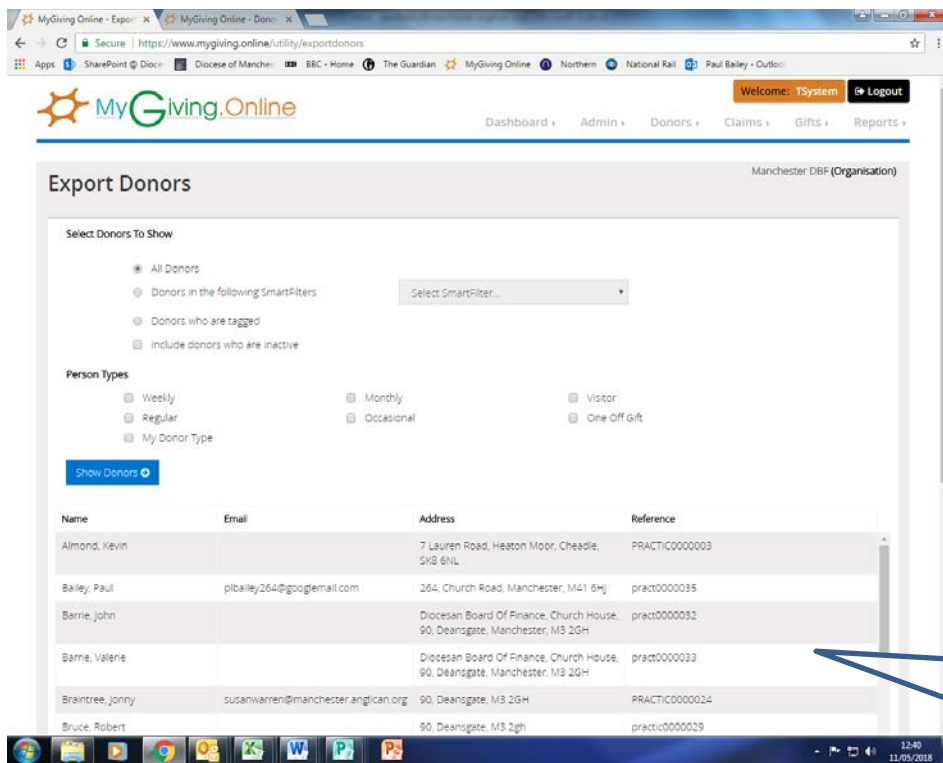
This window will open up on your screen.

You can select the donors you'd like to see in your export, for example: All Donors, Donors in the Following SmartFilters, Donors who are tagged, and Include donors who are inactive.

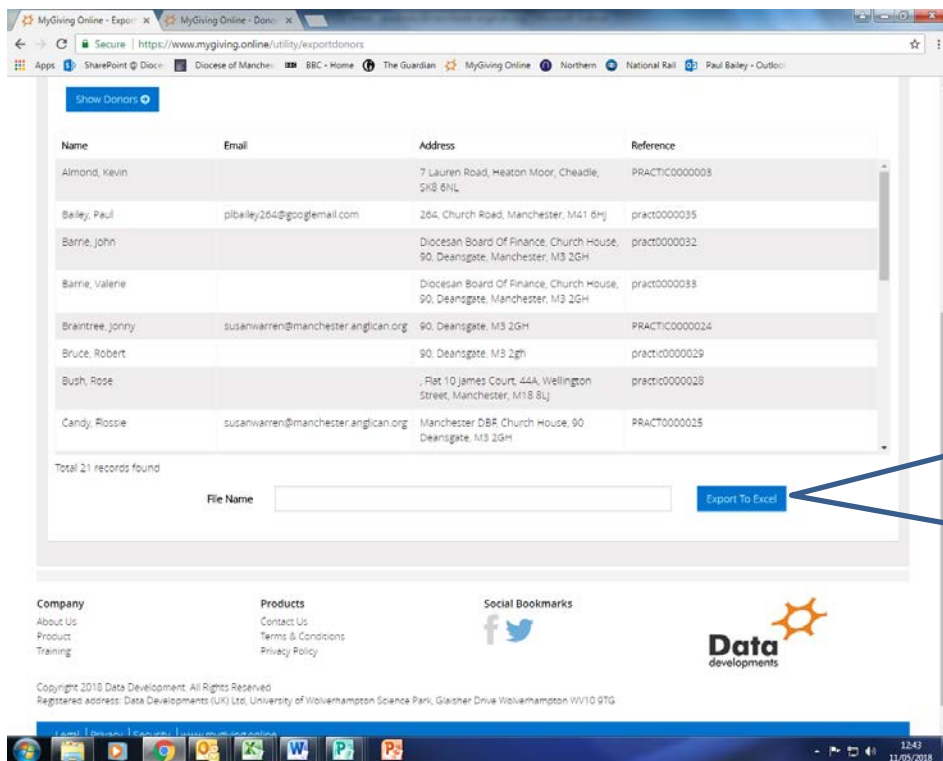
Once you have made your selections, click on Show Donors.

You can also select the Person Type you'd like to see in your export, for example: Weekly, Monthly, Visitor, Regular, Occasional, One Off Gift, and My Donor Type.

- Step 2

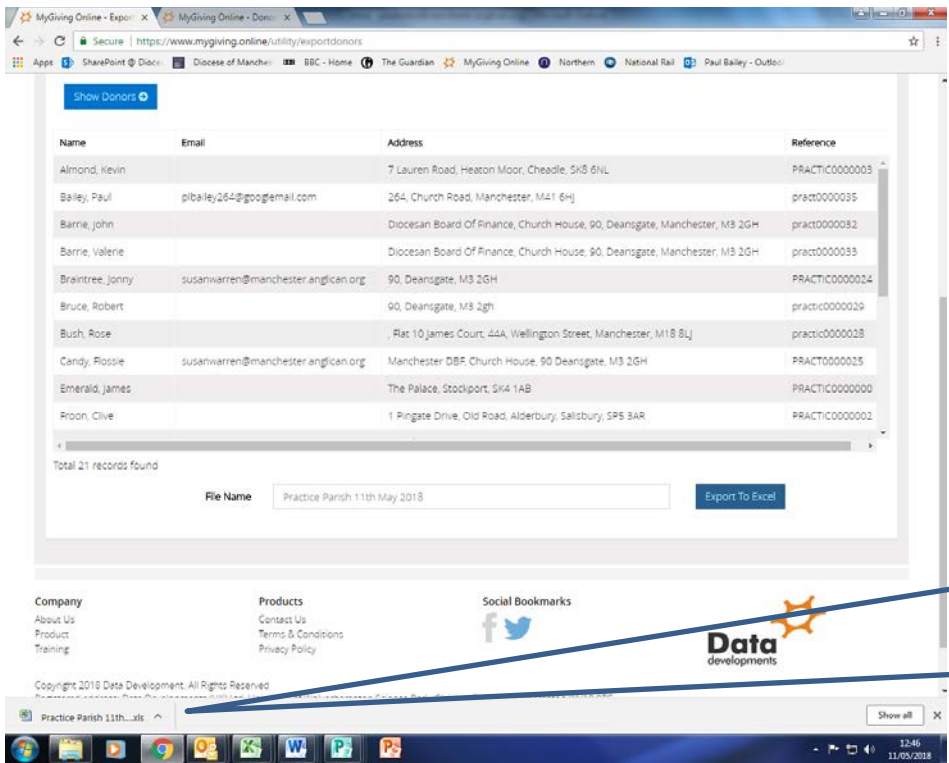


A list of your donors will appear at the bottom of your screen.



If you scroll down the screen you will see the Export To Excel button. Once you have typed in a file name you can click on it.

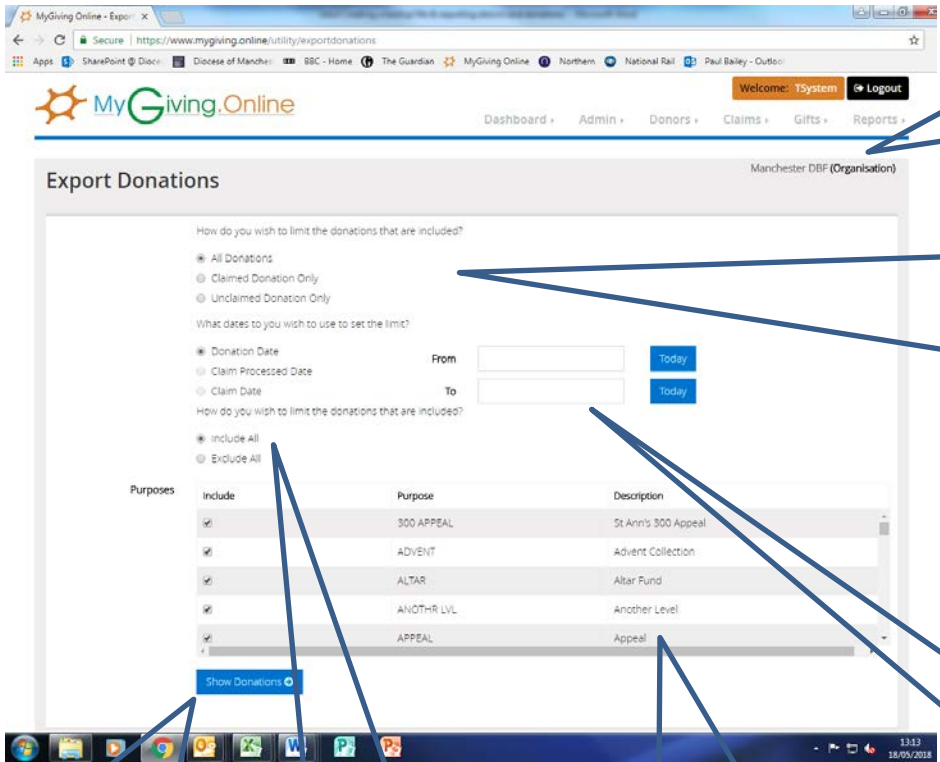
- Step 3



After you have clicked the Export To Excel button, you will see a copy of the file that has been created appear on your screen.

2. Exporting Donations

- Step 1



This window will open up on your screen.

You can limit the donations included within the export to these choices: All Donations, Claimed Donations Only, and Unclaimed Donations Only.

The dates of the donations to be included with the export can also be set.

Once you have made your selections, click on Show Donations.

A choice of including/excluding the donations that meet your choices can be made.

A choice of Purposes can also be selected for your donations.

- Step 2

MyGiving Online - Export Donations

Manchester DBF (Organisation)

How do you wish to limit the donations that are included?

- All Donations
- Claimed Donation Only
- Unclaimed Donation Only

What dates do you wish to use to set the limit?

Donation Date From: 01/01/2018 Today

Claim Processed Date To: 11/05/2018 Today

Claim Date

How do you wish to limit the donations that are included?

- Include All
- Exclude All

Purposes	Include	Purpose	Description
<input checked="" type="checkbox"/>	300 APPEAL	St Ann's 300 Appeal	
<input checked="" type="checkbox"/>	ADVENT	Advent Collection	
<input checked="" type="checkbox"/>	ALTAR	Altar Fund	
<input checked="" type="checkbox"/>	ANOTHR LVL	Another Level	
<input checked="" type="checkbox"/>	APPEAL	Appeal	

Show Donations

A list of your donors will appear at the bottom of your screen, but you may need to scroll down to see them.

MyGiving Online - Export Donations

Manchester DBF (Organisation)

Donation Date	Amount	Envelop	GASDS	Method	Purpose	Comment	Claimed	Claim Start	Claim End	Batch Reference
27/04/2018	20.00	N/A	False	GASDS	BOILER					2018-04-27
14/02/2018	10.00	22	True	GASDS	General					2018-05-02
02/05/2018	15.00	N/A	True	GASDS	General					2018-05-03
02/05/2018	5.00	N/A	True	GASDS	General					2018-05-03
03/05/2018	10.00	N/A	True	GASDS	GENERAL					2018-05-03
02/05/2018	15.00	22	True	GASDS - Cash	General					2018-05-02
02/05/2018	10.00	N/A	True	GASDS - Cash	General					GRD-180502
08/05/2018	20.00	N/A	True	GASDS - Cash	GENERAL					2018-05-02
02/05/2018	30.00	030	False	Envelope	General					2018-05-02

Total 16 records found

File Name: Export To Excel

If you scroll down the screen you will see the Export To Excel button. Once you have typed in a file name you can click on it.

- Step 3

MyGiving Online - Export Donations

Secure | https://www.mygivingonline/utility/exportdonations

SharePoint @ Dioc... Diocese of Manches... BBC - Home The Guardian MyGiving Online Northern National Rail Paul Bailey - Outloo

Show Donations

Donation Date	Amount	Envelop	GASDS	Method	Purpose	Comment	Claimed	Claim Start	Claim End	Batch Reference
27/04/2018	20.00	N/A	False	GASDS	BOILER					2018-04-27
14/02/2018	10.00	22	True	GASDS	General					2018-05-02
02/05/2018	15.00	N/A	True	GASDS	General					2018-05-03
02/05/2018	5.00	N/A	True	GASDS	General					2018-05-03
03/05/2018	10.00	N/A	True	GASDS	GENERAL					2018-05-03
02/05/2018	15.00	22	True	GASDS - Cash	General					2018-05-02
02/05/2018	10.00	N/A	True	GASDS - Cash	General					GRD-180502
08/05/2018	20.00	N/A	True	GASDS - Cash	GENERAL					2018-05-08
02/05/2018	30.00	030	False	Envelope	General					2018-05-02
02/05/2018	30.00	030	False	Envelope	General					2018-05-02

Total 16 records found

File Name: Donations received 1 1 18 to 11 5 18 Export To Excel

Company: About Us, Product, Training
Products: Contact Us, Terms & Conditions, Privacy Policy
Social Bookmarks: Facebook, Twitter
Data developments

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Donations received...xls Show all

15:14 11/05/2018

After you have clicked the Export To Excel button, you will see a copy of the file that has been created appear on your screen.