

## GAL15 – Managing your envelope donors and their numbers

As part of your data audit when you first start using Gift Aid Lite, we highly recommend producing a report showing the list of envelope numbers currently in use at your Church. From this you'll be able to see all of the envelope numbers being used by a specific donor, and you'll also be able to mark as active/inactive those envelope numbers you wish to use in the future.

Please note - we do not recommend deleting envelope numbers for specific donors. Instead mark the number as being inactive for that donor, as this will not affect the audit trail for donations.

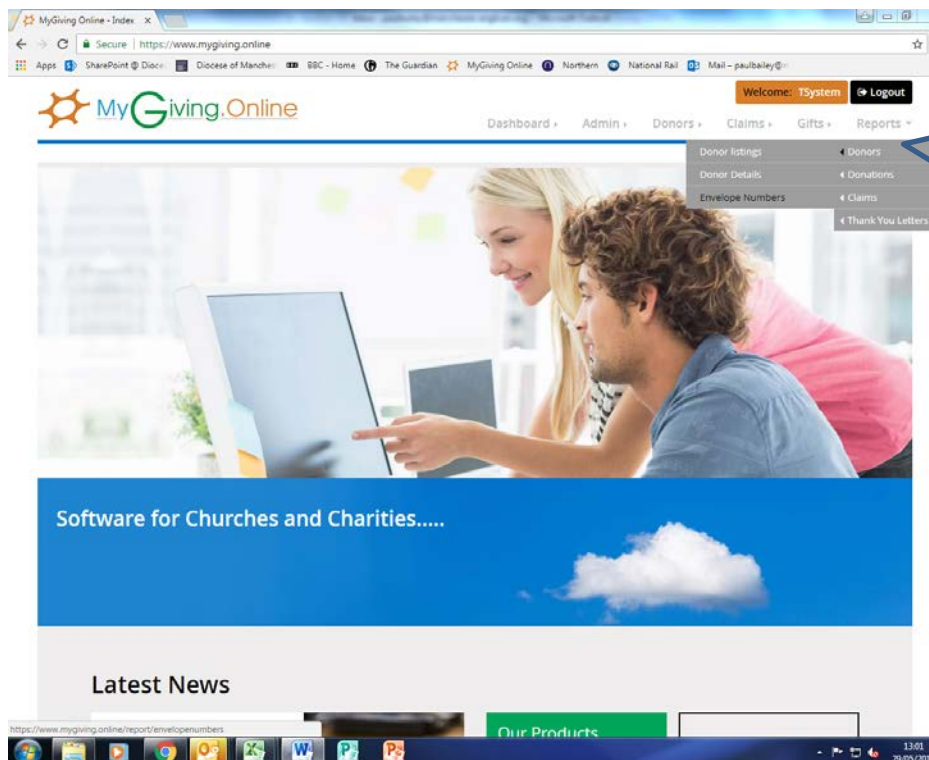
It is also important to choose a suitable alphanumeric method to record your numbers in a uniform manner. This is particularly useful if you'd like to sort your donors by ascending or descending envelope numbers. For example, if your envelope numbers are in the tens or hundreds use three digits (e.g. 001, 014, 118, 999); or if it is a larger number use four digits (e.g. 0001, 0014, 0118, 0999, 1132).

Use the following guide to help you, which is split into the following sections:

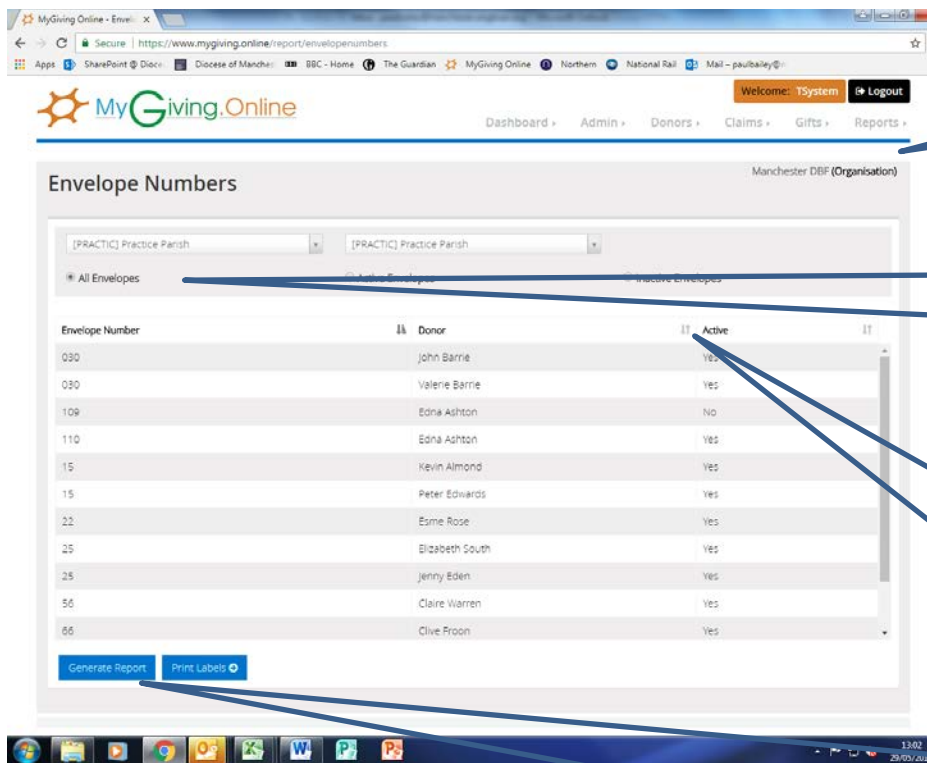
1. Producing a report showing your active and inactive envelopes
2. Adding a donor's envelope number
3. Editing a donor's active envelope numbers

1. Producing a report showing your active and inactive envelopes

- Step 1



- Step 2



This window will appear.

Click here to restrict your view to see All Envelopes.

Click on ↑↓ to order your view alphanumerically by Envelope Number, Donor or Active.

Click on Generate Report to produce a PDF document showing All Envelopes, Active Envelopes or Inactive Envelopes.

Envelope Numbers Report : Manchester DBF (Organisation)

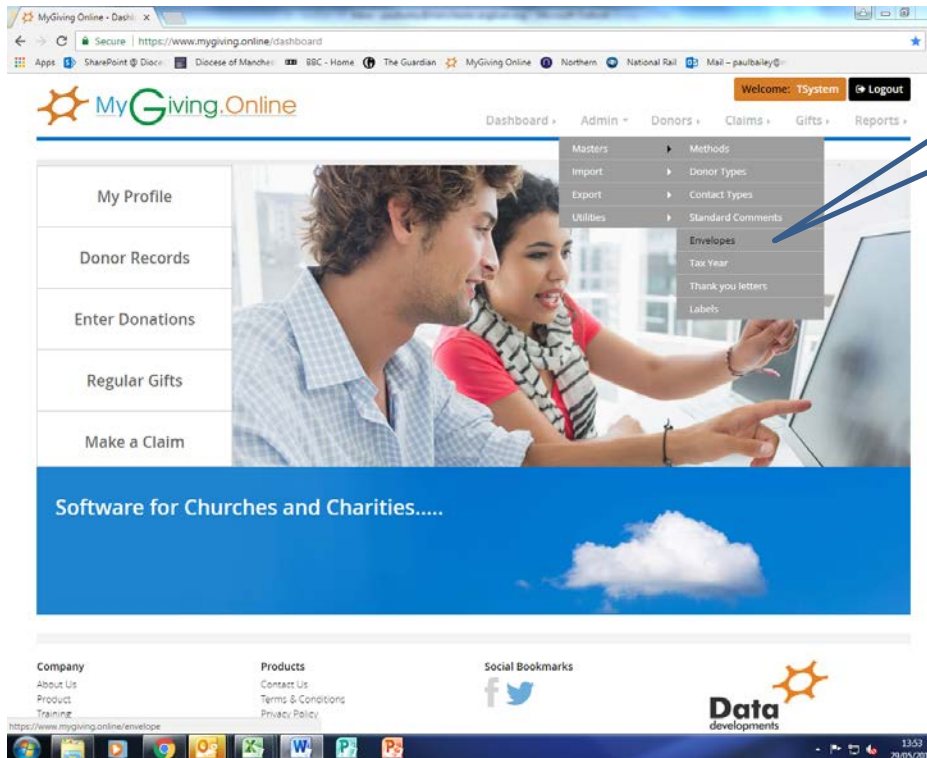
OLGA (OnLine Gift Aid)

| Envelope | Donor           | Comment | Active |
|----------|-----------------|---------|--------|
| 56       | Claire Warren   |         | Yes    |
| 66       | Clive Froom     |         | Yes    |
| 110      | Edna Ashton     |         | Yes    |
| 109      | Edna Ashton     |         | No     |
| 25       | Elizabeth South |         | Yes    |
| 22       | Ernie Rose      |         | Yes    |
| 66       | Francis Rossi   |         | Yes    |
| 25       | Jenny Eden      |         | Yes    |
| 030      | John Barrie     |         | Yes    |
| 7        | Kevin Almond    |         | Yes    |
| 15       | Kevin Almond    |         | Yes    |
| 15       | Peter Edwards   |         | Yes    |
| 030      | Valerie Barrie  |         | Yes    |

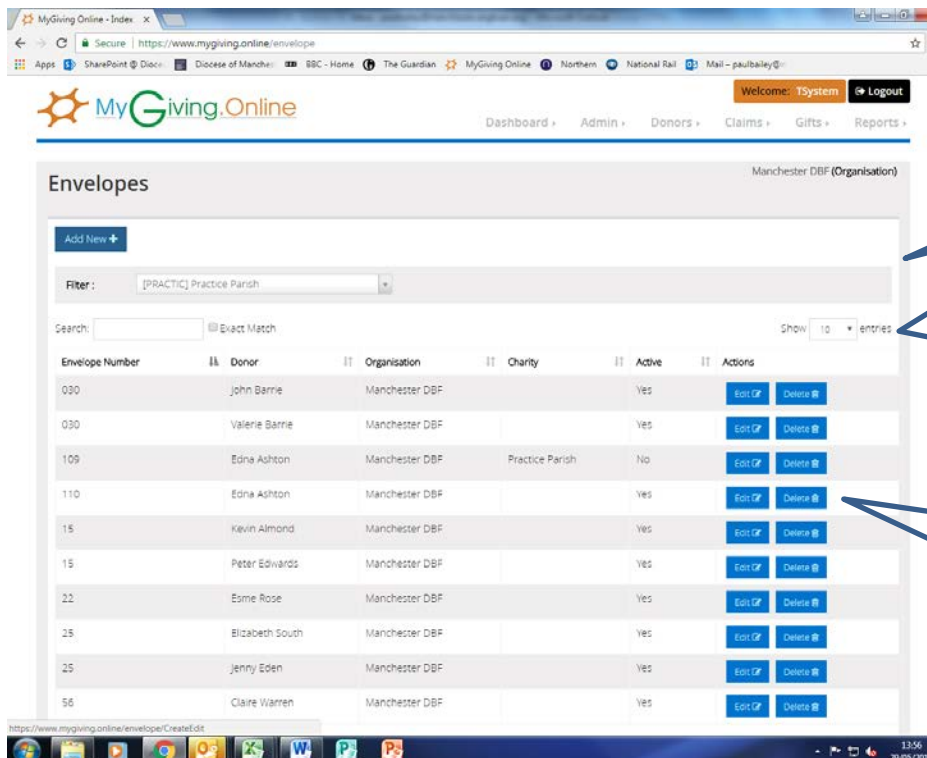
This is an example of the PDF document produced when you click on Generate Report. You can print this if required.

## 2. Adding a donor's active envelope numbers

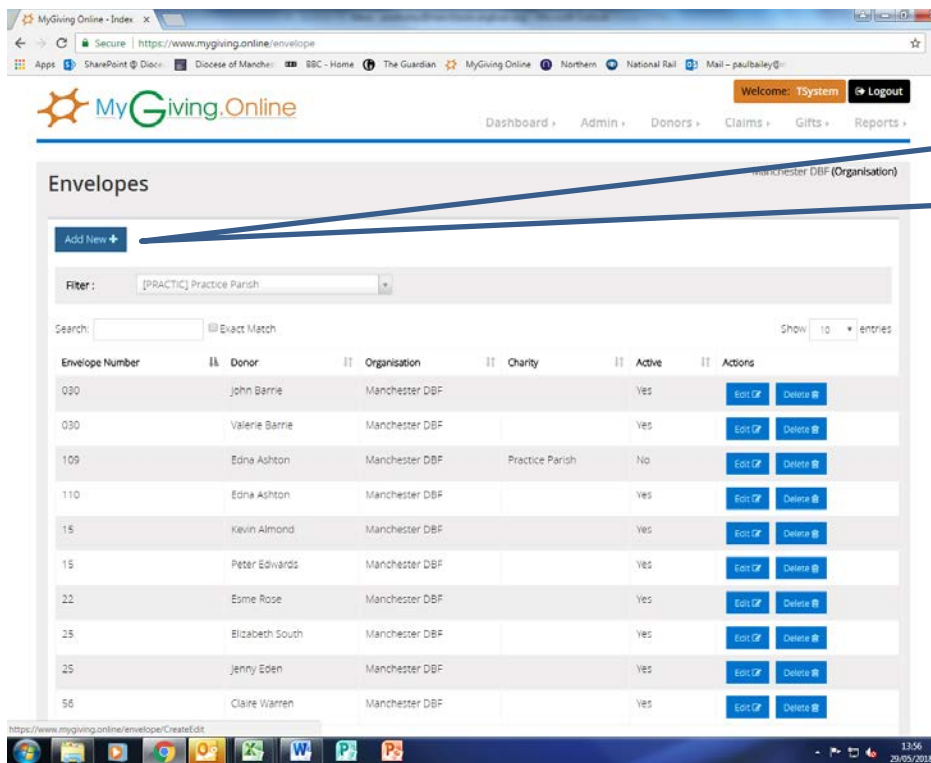
- Step 1



- Step 2

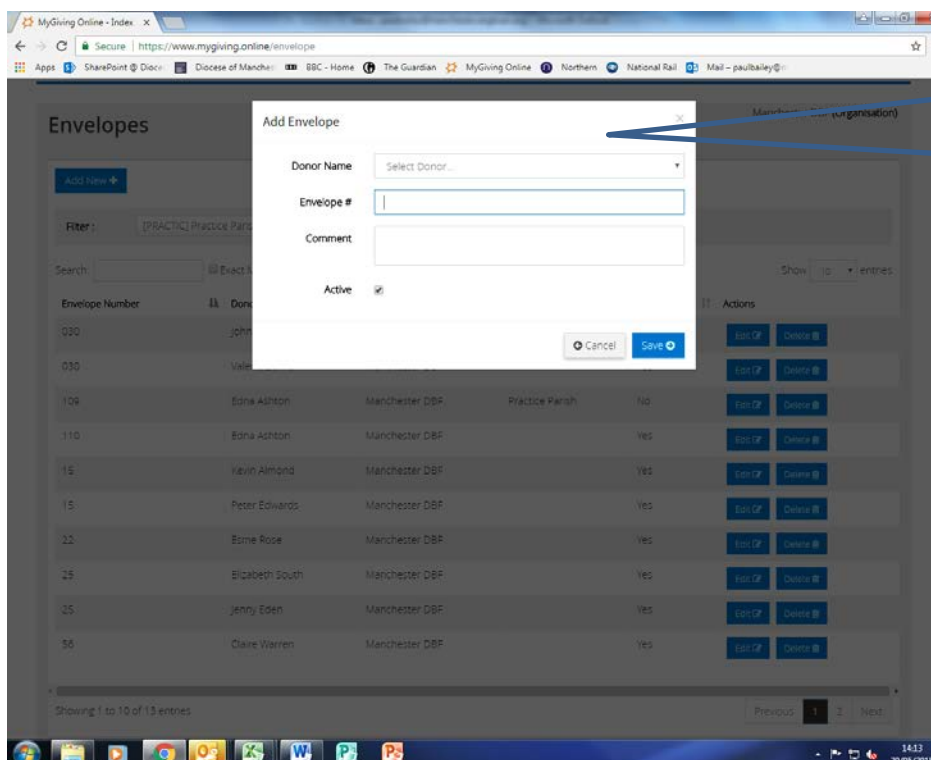


- Step 3



Click on Add New. You can also add a donor's envelope number on a Donor Record.

- Step 4



This pop up window will appear. See below for instructions on how to complete it.

- Step 5

The screenshot shows the 'Add Envelope' form with the 'Donor Name' dropdown menu open. The dropdown list contains the following donor names: Almond, Kevin (Branch - Practice Parish); Ashton, Edna (Branch - Practice Parish); Bailey, Paul (Branch - Practice Parish); Barrie, John (Branch - Practice Parish); Barrie, Valerie (Branch - Practice Parish); Braintree, Jonny (Branch - Practice Parish); Bruce, Robert (Branch - Practice Parish); Bush, Rose (Branch - Practice Parish); Candy, Flossie (Branch - Practice Parish); Edwards, Peter (Branch - Practice Parish); Emerald, James (Branch - Practice Parish); Froom, Clive (Branch - Practice Parish); Inger, Jane (Branch - Practice Parish); Quatro, Suzi (Branch - Practice Parish); Rose, Esme (Branch - Practice Parish); Rossi, Francis (Branch - Practice Parish); Rowley, Margaret (Branch - Practice Parish); Rowley, William (Branch - Practice Parish); South, William Charles (Branch - Practice Parish). The 'Envelope #' field is empty, the 'Comment' field is empty, and the 'Active' checkbox is checked.

Click on the Select Donor drop list to pick a name. You can type in the first letter of a surname to jump to that donor in the list.

- Step 6

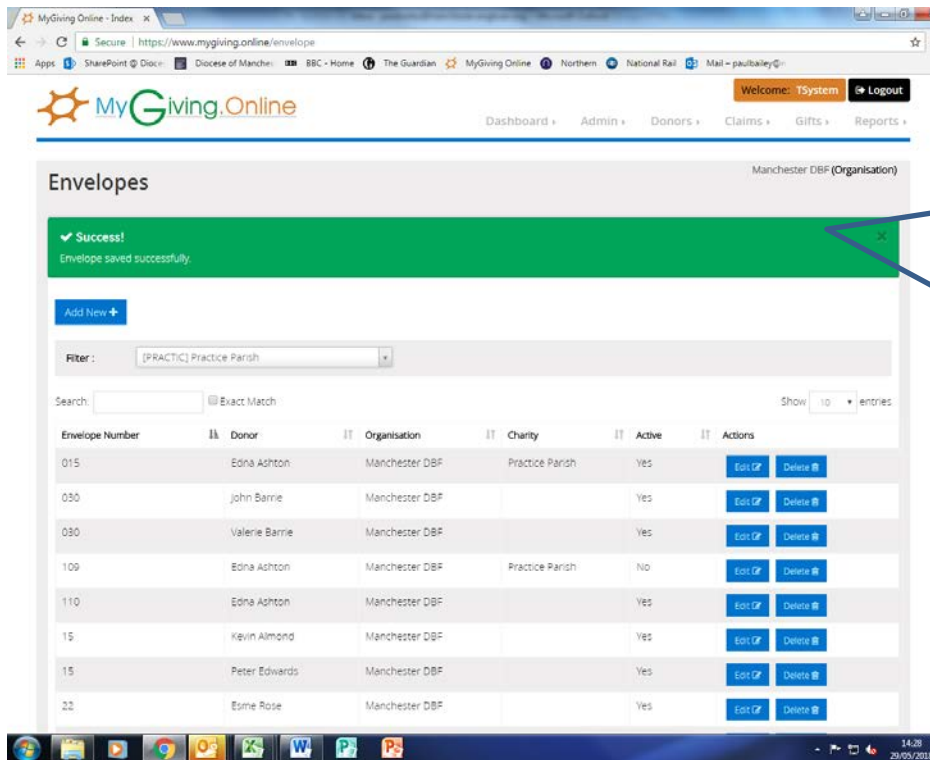
The screenshot shows the 'Add Envelope' form with the 'Donor Name' dropdown menu closed. The selected donor name is 'Ashton, Edna (Branch - Practice Parish)'. The 'Envelope #' field contains '015'. The 'Comment' field is empty. The 'Active' checkbox is checked. The 'Cancel' and 'Save' buttons are visible at the bottom right.

The selected donor's name will be entered. Type in the envelope number you'd like to enter. Don't forget to enter in a uniform three or four digit manner (e.g. 020 or 0020) if you'd like to order them alphanumerically at a later stage.

You can add a comment about this envelope if you wish.

Click on Save to store your changes.

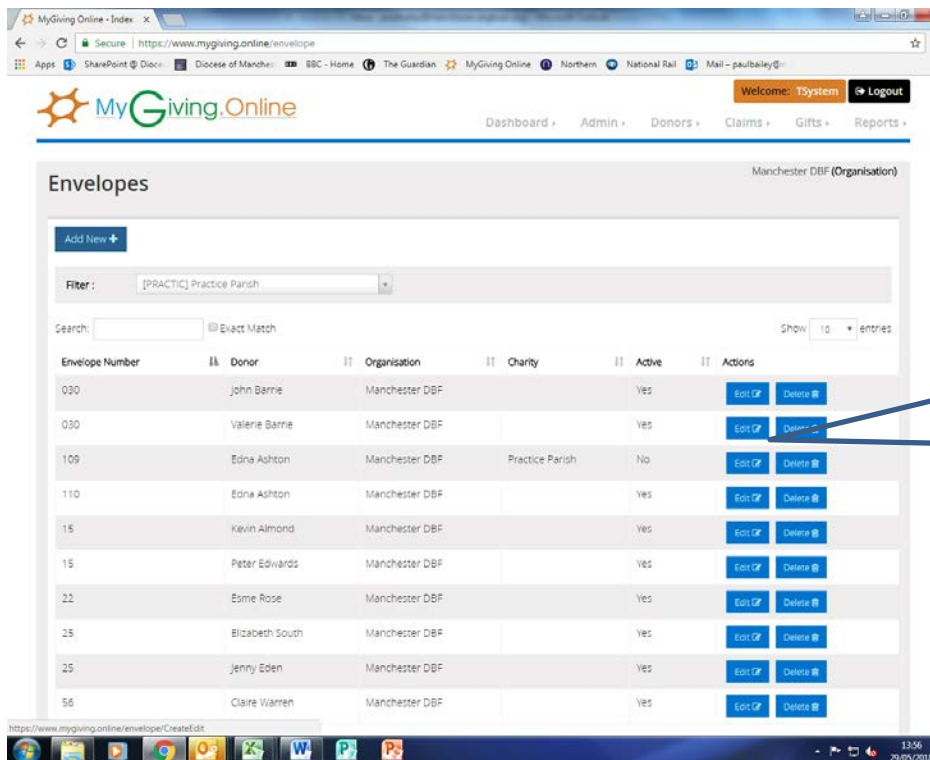
- Step 7



A Success message will appear to show the envelope has been saved. You'll also be able to see it in the list of donors for your Church.

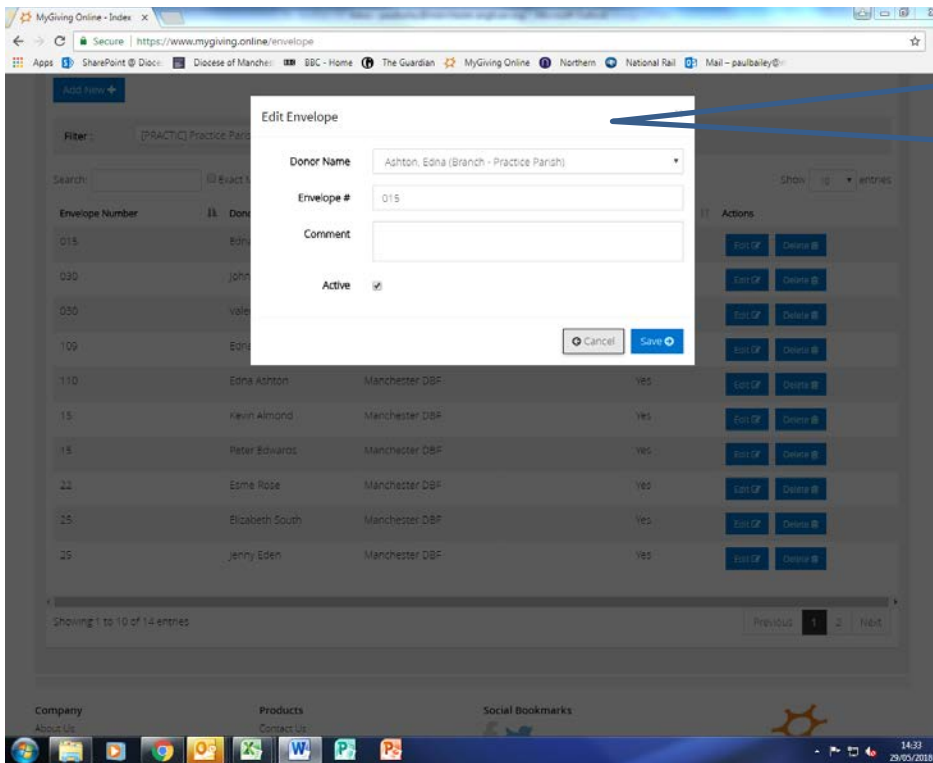
### 3. Editing a donor's active envelope numbers

- Step 1

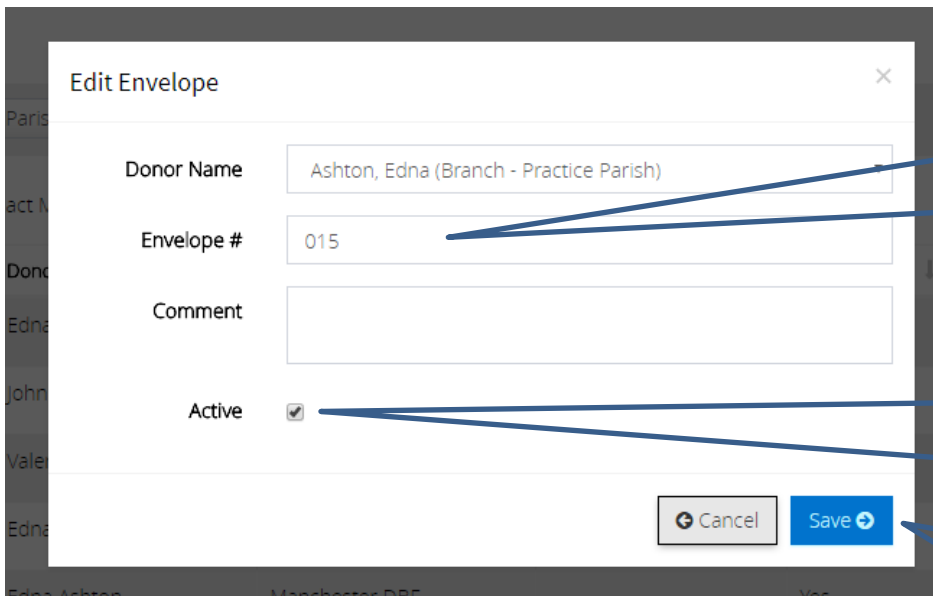


Click on Edit to amend the envelope number for a donor of your choice.

- Step 2



This pop up window will appear. See below for instructions on how to complete it.

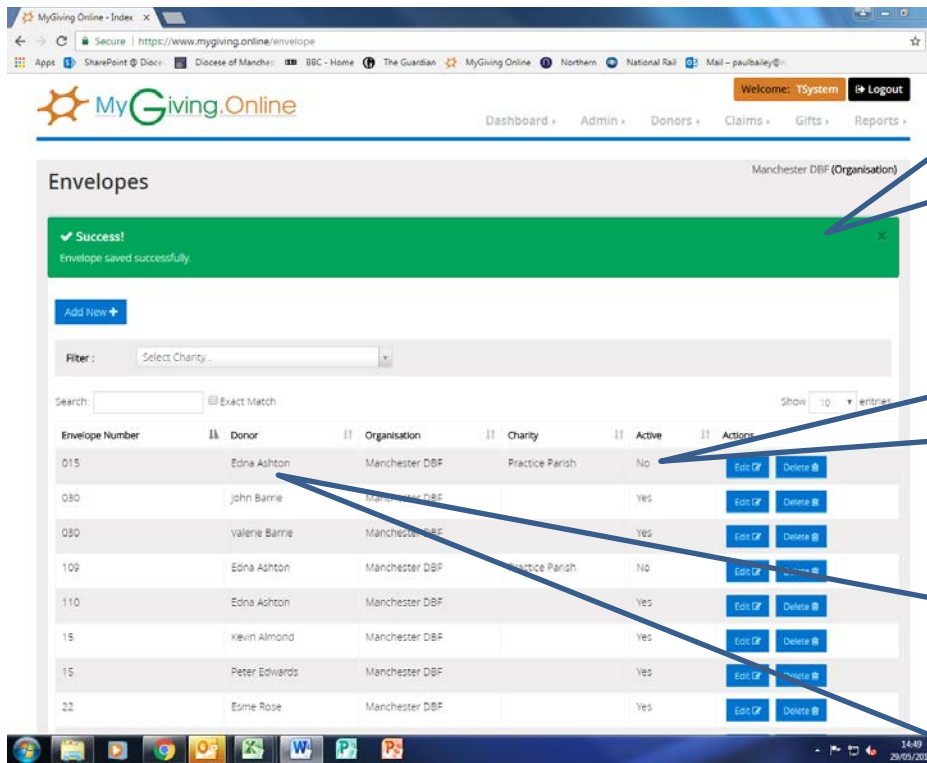


You can change the envelope number to a three or four digit one by typing it here.

If you wish to make the envelope number inactive, please untick the Active box.

Click on Save to store your changes.

- Step 3



A Success message will appear to show the envelope change has been saved.

You'll be able to see the envelope number has been marked inactive.

The Envelope Number column has been selected to sort the records based on this selection. As the top three records have had their envelopes entered in a uniform three digit format, they appear in a descending number order.