

activity report

What the report shows: The first part of the report shows details of the one-off gifts that have been allocated to your account. The second part shows details of any new regular gift allocations that have been created and of any changes to existing regular gift allocations. These sections will only if either a one-off or regular gift has been allocated to your account within the specified time period.

Date from/Date to: This report automatically shows the last full week or month where there has been activity on the account, but you can change the date range and review back to 1st May 2010. When inputting the date manually (without using the calendar), click View Report twice.

Show extra columns: The report will automatically show the following: **Change** (this is for changes to regular allocated gifts, it will show: new, increase, decrease, closed, date/frequency, tax, project, details), **Giver, Amount, Frequency** (this could be monthly, quarterly, six monthly, or annually), **Date** (the date the one-off gift was allocated into your recipient account; this will be different from the date the grant was transferred into your bank account), **Change date** (this is for regular allocated gifts only, this is the date the change was made on our system), **Next date** (this is the next date that the regular gift will be allocated to your recipient account, it is not the date that it will be received into your bank account), **End date** (this date will show if the regular gift allocation is for a limited period), **Reference** (this is the full allocated gift reference).

You can also choose to see the following:

Address (the Giver's address), **Giver title, Giver forename, Giver surname, Details** (additional information, such as a reference. If you have set up a project this column will also show which project the allocated gift was intended for), **Tax inclusive** (if the gift allocation has reclaimed tax to follow, a further gift will be allocated 6-8 weeks after the original gift allocation), **Giver No.** (the Giver's unique reference with Stewardship).

If you do not wish to see or export all the above information, simply un-tick the boxes you do not wish to view. When exporting to a csv file all the columns will be exported.

Date from: 26/07/2010 Date to: 01/08/2010 View Report

Project: General funds Show extra columns: Change, Giver, Amount, Freque

Type: One-off

Project: The report will automatically show the allocated gifts made to each project, if you have any set up. However, you can un-tick the projects you do not wish to see.

Date from: 26/07/2010 Date to: 01/08/2010 View Report

Project: General funds Show extra columns: Change, Giver, Amount, Freque

Type: One-off

One-off

(Select All)

One-off

Voucher

Type: This is for the one-off allocated gift section of the report. If there have been any one-off gifts allocated to your account these will show automatically, if you wish to see if any vouchers that have been allocated to you account then tick the box next to vouchers and click 'View Report'.

The regular allocated gifts shown on your report may appear for a number of reasons. This reason will show under the 'change' column.

This key provides further detail:

New	A regular gift allocation has been setup within the activity date range.
Closed	A regular gift allocation has reached the end date within the activity date range.
Increase	Amount of regular gift allocation has been increased.
Decrease	Amount of regular gift allocation has been decreased.
Next Date	Date of next regular allocation has been changed within the activity date range.
End Date	Date of the final regular allocation has been changed within the activity date range.
Frequency	The frequency of the regular allocation has been changed within the activity date range.
Tax	The tax reclaimed on a regular gift allocation has been changed. Select 'Tax inclusive' from the 'show extra columns' dropdown menu to see if the regular gift allocation is now tax inclusive.
Project	The project that the allocated gift was intended for has changed. Project may have been added, removed or replaced with another project.
Details	The reference used for this allocated gift has either been added, removed, or altered.