















# reports

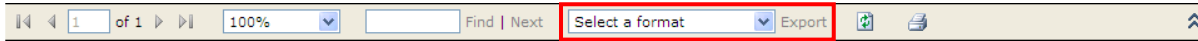
getting to grips with our online reports

You can view guidance on all the reports by scrolling down or click on a specific report below.

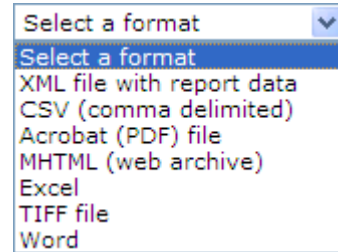
<a href="#">your overview</a> 	<a href="#">activity report</a> 	
<b>allocated gifts</b>	<b>grants</b>	<b>charts</b>
<a href="#">regular</a> 	<a href="#">breakdown</a> 	<a href="#">allocations by type</a> 
<a href="#">detail</a> 	<a href="#">on the way</a> 	<a href="#">monthly comparison</a> 
<a href="#">tax reclaims</a> 	<a href="#">available</a> 	<a href="#">yearly comparison</a> 
<a href="#">largest givers</a> 	<a href="#">by tax year</a> 	
<a href="#">summary</a> 		

# getting more from your reports

All our reports have the same standard features which are shown below:

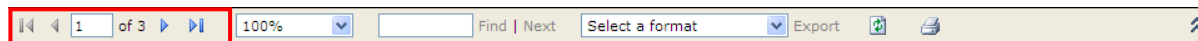


You can view your report online or you can choose to export a report. Select the format you want and then click export; you can then choose to open or save the file.

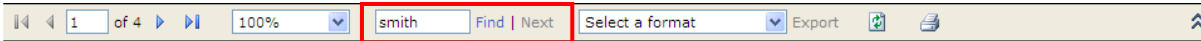


To be able to view the Excel and Word documents you will need to have Word: 97-2003 (.doc) or Excel: 97-2003 (.xls)

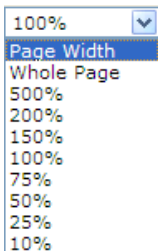
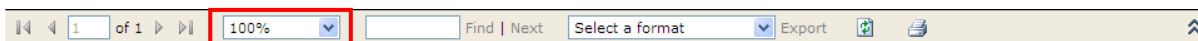
If you would like to manipulate data in Excel it is best to export a CSV (comma delimited) file. When this file is opened it will open in Excel or an equivalent spreadsheet.



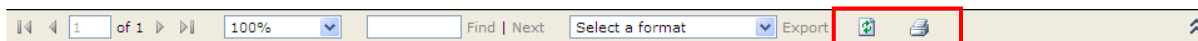
If a report is more than one page, you can use these navigation arrows to scroll through the report.



You can also search a report; this is particularly useful if the report is shown on more than one page as the search will search the whole report not just the current page you are viewing. You can search for all or part of the information you require, i.e. if searching for Smith you can just type in Smi. This search will only search forward, if Smith is on the previous page it will not be found, therefore it is best to be on page one when searching (the find function is not shown when viewing your account on certain internet browsers).



If you would like the report to appear in a different size then select a percentage from the dropdown menu (the zoom function is not shown when viewing your account on certain internet browsers).



You can also refresh the report screen and print your report using the report toolbar (the print function is not shown when viewing your account on certain internet browsers).



Giver	Amount	Type	Short reference	Allocation date	Project	Details
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Some of the reports allow you to sort the columns into either ascending or descending order. When you click on the arrow for the first time the column will be sorted into ascending order, if you click the arrow again the column will be sorted into descending order. To return to your original view click refresh.

Date from: 03/12/2008    Date to: 03/12/2009    View Report

Type: Regular gift, One-off gift, Vouch    Project: General funds, Building Fund

1 of 1    100%    Find | Next    Select a format    Export   

To move reports further up the screen you can hide the parameters by clicking on the double arrows.

1 of 1    100%    Find | Next    Select a format    Export   

To see the parameters again click on the double arrows.

# overview

**What the report shows:** The overview is a snapshot of your account activity; if you would like to see more detail of each of the 4 reports available from this page, simply click on 'more' and this will take you to the relevant report.

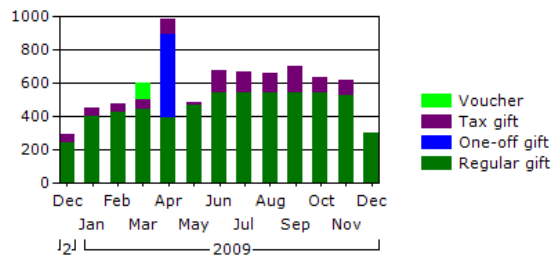
## overview

### summary of allocated gifts

Last year:	£7,540.82
Last quarter:	£1,886.05
Last month:	£613.32

[More](#)

### allocated gifts by type



[More](#)

### largest givers

Giver	Total
Ronald McDonald	£2,025.00
Theresa Green	£160.00
Peter Jones	£130.00
Joan Brown	£130.00
Jane Smith	£20.00

[More](#)

### recent allocated gifts

Date	Giver	Type	Amount
03/12/2009	Theresa Green	Regular gift	£60.00
03/12/2009	Theresa Green	One-off gift	£100.00
03/12/2009	Jane Smith	One-off gift	£20.00
03/12/2009	Anonymous	Regular gift	£30.00
03/12/2009	Joan Brown	Voucher	£50.00
03/12/2009	Joan Brown	One-off gift	£80.00
03/12/2009	Peter Jones	Voucher	£30.00
03/12/2009	Peter Jones	One-off gift	£100.00
03/12/2009	Ronald McDonald	Voucher	£25.00
03/12/2009	Anonymous	Voucher	£35.00

[More](#)

# 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'.

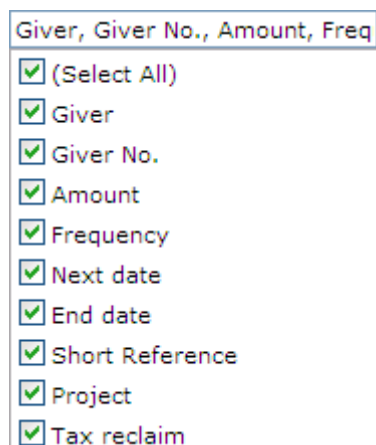
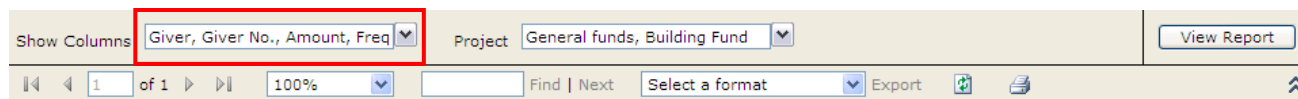
The regular allocated gifts shown on your report may appear for a number of reasons. This reason will show under the 'change' column.

This key provides further detail:

<b>New</b>	A regular gift allocation has been setup within the activity date range.
<b>Closed</b>	A regular gift allocation has reached the end date within the activity date range.
<b>Increase</b>	Amount of regular gift allocation has been increased.
<b>Decrease</b>	Amount of regular gift allocation has been decreased.
<b>Next Date</b>	Date of next regular allocation has been changed within the activity date range.
<b>End Date</b>	Date of the final regular allocation has been changed within the activity date range.
<b>Frequency</b>	The frequency of the regular allocation has been changed within the activity date range.
<b>Tax</b>	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.
<b>Project</b>	The project that the allocated gift was intended for has changed. Project may have been added, removed or replaced with another project.
<b>Details</b>	The reference used for this allocated gift has either been added, removed, or altered.

# regular gift allocations

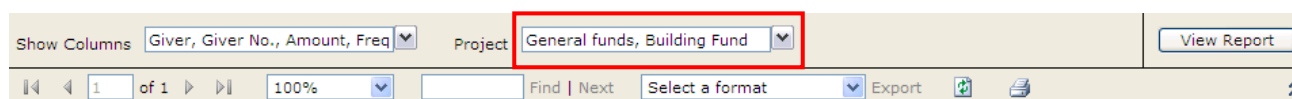
**What the report shows:** Details of regular gift allocations



**Show columns:** The report will automatically show the following:

**Giver, Giver No.** (the Giver's unique reference), **Amount, Frequency** (this could be monthly, quarterly, six monthly, or annually), **Next date** (this is the date that the gift will be allocated to your recipient account, this is not the date that it is received into your bank account. Please be aware that the gift allocation can be cancelled or changed before the next date, therefore this list can only be used as a guide of future allocations), **End date** (this date will only show if the gift allocation is for a limited period), **Short Reference** (this is the first part of the allocated gift reference), **Project** (if you have set up a project this column will show which project the allocated gift was intended for), **Tax reclaim** (if the regular gift allocation has reclaimed tax to follow, a further gift will be allocated 6-8 weeks after the original gift allocation).

If you do not wish to see or export all the above information, simply un-tick the boxes you do not wish to see.



**Project:** To obtain details relating to specific projects you can select from the 'Project' dropdown menu.

Report example:

## regular gift allocations



Project(s) General funds; Building Fund

Giver	Giver No.	Amount	Frequency	Next date	End date	Short reference	Project	Tax reclaim
Anonymous	Anonymous	£30.00	Monthly	03/01/2010	-	00485717		No
Anonymous	Anonymous	£75.00	Monthly	09/01/2010	-	00485702		Yes
Joan Brown	20110807	£45.00	Annually	14/04/2010	-	00485719	Building Fund	No
Theresa Green	20110805	£50.00	Monthly	09/01/2010	-	00485704		No
Theresa Green	20110805	£100.00	Monthly	05/01/2010	-	00485714	Building Fund	No
Theresa Green	20110805	£60.00	Monthly	03/01/2010	-	00485724		No
Peter Jones	20110808	£60.00	Monthly	09/01/2010	-	00485703	Building Fund	Yes
Peter Jones	20110808	£75.00	Monthly	21/01/2010	-	00485720		No
Ronald McDonald	20110809	£25.00	Monthly	09/01/2010	-	00485705		Yes
Ronald McDonald	20110809	£20.00	Monthly	15/02/2010	-	00485721		No
Jane Smith	20110806	£50.00	Quarterly	07/01/2010	-	00485715		No

# allocated gift details

**What the report shows:** Details of allocated gifts, broken down by type (regular, one-off, reclaimed tax and voucher).

**Date from/Date to:** This report automatically shows the last months allocated gifts, although you can review from 1<sup>st</sup> January 2007. When inputting the date manually (without using the calendar), click view report twice.

**Type:** The report automatically shows each type of allocated gift. You can select the type you wish to view by using the dropdown menu.

**Projects(s):** 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: 10/11/2009 Date to: 10/12/2009 View Report

Type: regular, one-off, voucher Project(s): General funds, Building Fund

Show columns: Date, Amount, Giver, Type, De Search by giver (surname first, no commas):

Search by reference:

1 of 1 100% Find | Next Select a format Export

Date, Amount, Giver, Type, De

(Select All)

Date

Amount

Giver

Type

Details

Reference

**Show columns:** The report will automatically show the following:

**Date**, (this is the date that the gift was allocated to your recipient account; this will be different to the date it was received into your bank account), **Amount**, **Giver**, **Type**, **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), **Reference** (this is the full allocated gift reference).

If you do not wish to see or export all this information, simply un-tick the boxes you do not wish to see.

Date from: 10/11/2009 Date to: 10/12/2009 View Report

Type: regular, one-off, voucher Project(s): General funds, Building Fund

Show columns: Date, Amount, Giver, Type, De Search by giver (surname first, no commas):

Search by reference:

1 of 1 100% Find | Next Select a format Export

**Search by giver:** If you would like to view all the allocated gifts in a given period requested by one giver then type their name and click on **'View Report'**.

**Search by reference:** If you have all or part of a transaction reference you can search the report for the corresponding allocated gift.



Report example:

## allocated gift details



<b>Account:</b>	20110804	<b>Type(s):</b>	Regular gift; One-off gift; Voucher		
<b>Date from:</b>	03/11/2009	<b>Project(s):</b>	General funds; Building Fund		
<b>Date to:</b>	03/12/2009	<b>Total amount:</b>	£2,530.00		

Date ↕	Amount ↕	Giver ↕	Type ↕	Details ↕	Reference ↕
03/12/2009	£100.00	Peter Jones	One-off gift	Building Fund	00485634/00N0-00
03/12/2009	£50.00	Joan Brown	Voucher		00485666/00Y0-00
03/12/2009	£35.00	Anonymous	Voucher	Building Fund	00485681/00Y0-00AN
03/12/2009	£25.00	Ronald McDonald	Voucher		00485682/00Y0-00
03/12/2009	£30.00	Peter Jones	Voucher		00485636/00Y0-00
03/12/2009	£100.00	Theresa Green	One-off gift		00485725/00N0-00
03/12/2009	£20.00	Jane Smith	One-off gift		00485726/00N0-00
03/12/2009	£80.00	Joan Brown	One-off gift	Building Fund	00485727/00N0-00
03/12/2009	£2,000.00	Ronald McDonald	One-off gift		00485728/00N0-00
03/12/2009	£60.00	Theresa Green	Regular gift		00485724/01D0-01
03/12/2009	£30.00	Anonymous	Regular gift		00485717/01D0-01AN
<b>Total amount:</b>	<b>£2,530.00</b>				

# tax reclaims

**What the report shows:** Reclaimed tax that has been or is due to be distributed to you in a grant. The report links the reclaimed tax to the original gift allocation.

**Date from/Date to:** This report automatically shows the last 6 months gift allocations which have a reclaimed tax allocation associated with it. If you would like to view a particular period you can do this by changing the 'Date from' date and the 'Date to' date and then click 'View Report'. When inputting the date manually (without using the calendar), click view report twice.

**Project(s):** You can also choose to see the most recent allocations for each project you may have set up. The report will automatically show gifts allocated to all the projects, however you can un-tick the projects you do not wish to see.

**Search by reference:** If you have all or part of a transaction reference you can search the report for the corresponding gift allocation.

**Search by giver:** If you would like to view all the allocated gifts in a given period requested by one giver then type their name and click on 'View Report'.

Report example:

## tax reclaims

Gifts allocated from: 03/06/2009

Gifts allocated to: 03/12/2009

Project(s): General funds; Building Fund

Reference	Gift type	Giver	Amount	Grant date	Project
00435398-00	Gift	Theresa Green	£3,600.00	15/01/2009	
	Reclaimed Tax Gift	Theresa Green	£876.92	05/03/2009	
00435371-01	Gift	Ronald McDonald	£56.00	22/01/2009	
	Reclaimed Tax Gift	Ronald McDonald	£13.64	05/03/2009	
00435372-01	Gift	Peter Jones	£350.00	04/02/2009	
	Reclaimed Tax Gift	Peter Jones	£85.26	02/04/2009	

# largest givers

**What the report shows:** The total amount of allocated gifts broken down by the individual givers who requested the gift allocations. These will be shown in order of magnitude within a specified time period.

**Date from/Date to:** This report automatically shows the gifts allocated within the last year, although you can review from 1st January 2007. When inputting the date manually (without using the calendar), click view report twice.

**Number of rows:** The report automatically shows the 10 largest givers, although this can be changed to any number you wish.

**Show extra columns:** The report will automatically show the following: **Giver, Total** (total allocated gifts for a given period - includes all types).

You can also choose to see the following:

**Giver No.** (The Giver's unique reference), **Postcode** (the giver's Postcode).

**Project(s):** You can also choose to see the largest givers for each project you may have set up. The report will automatically show the total gift allocations to all the projects; however you can un-tick the projects you do not wish to see.

Report example:

## largest givers



**Date from:** 03/12/2008

**Date to:** 03/12/2009

**Project(s)** General funds; Building Fund

Giver	Total
Ronald McDonald	£2,025.00
Theresa Green	£160.00
Peter Jones	£130.00
Joan Brown	£130.00
Jane Smith	£20.00
	<b>£2,465.00</b>

# summary of allocated gifts

**What the report shows:** The total number and value of allocated gifts in a specified period. A breakdown by project will be shown if any have been set up.

**Date from/Date to:** This report automatically shows gifts allocated during the previous month, although you can review gift allocations from 1<sup>st</sup> January 2007. When inputting the date manually (without using the calendar), click view report twice.

Report example:

## summary of allocated gifts

**Date from:** 03/11/2009

**Date to:** 03/12/2009

Project	Total value	Total number
General funds	£2,315.00	8
Building Fund	£215.00	3
<b>Total</b>	<b>£2,530.00</b>	<b>11</b>

# breakdown

**What the report shows:** Details of allocated gifts, listed by grant payment date.

The initial report shows the breakdown of your last grant. If you would like to view breakdowns of other grants made to you, then please select the required date from the 'select grant date' dropdown menu. The grant date is the date the payment arrived in your bank account. You can view the breakdown of all grants made within the last 6 months.

Select grant date  Show extra columns    
 Project

General funds, Building Fund  
 (Select All)  
 General funds  
 Building Fund

**Projects:** To obtain details of specific projects you can select from the 'Project' dropdown menu

Select grant date  Show extra columns    
 Project

Giver, Amount, Type, Short ref  
 (Select All)  
 Giver  
 Giver title  
 Giver forename  
 Giver surname  
 Amount  
 Type  
 Reference  
 Short reference  
 Allocation date  
 Project  
 Details  
 Payroll giver  
 Giver postcode  
 Giver No.  
 Old Giver No.  
 Grant date

The report automatically shows the following details:

**Giver, Amount, Type** (this is the type of allocated gift, i.e. voucher, regular etc.), **Short reference** (this is the first part of the allocated gift reference), **Allocation date** (the date the gift was allocated into your recipient account; this will be different from the date the grant was transferred into your bank account), **Project** (if you have set up a project this column will show which project the allocated gift was intended for), **Details** (this may include additional information, such as a reference).

You can also choose to see the following:

**Giver title, Giver forename, Giver surname, Reference** (this is the full allocated gift reference), **Payroll giver** (if the gift received has originated from a giver who pays into their giving account via a payroll giving scheme then 'Y' will appear), **Giver postcode, Giver No.** (the Giver's unique reference), **Old Giver No.** (the Giver's previous reference), **Grant date** (the date the grant was received into your bank account).



Report example:

## breakdown



### Allocated gifts included in grant(s) dated 10/12/2009 for project(s) General funds; Building Fund

Giver	Amount	Type	Short reference	Allocation date	Project	Details
Jones Peter	£30.00	Voucher	00485636	03/12/2009		
Brown Joan	£50.00	Voucher	00485666	03/12/2009		
McDonald Ronald	£25.00	Voucher	00485682	03/12/2009		
Anonymous	£30.00	Regular	00485717	03/12/2009		
Green Theresa	£60.00	Regular	00485724	03/12/2009		
Green Theresa	£100.00	One-off	00485725	03/12/2009		
Smith Jane	£20.00	One-off	00485726	03/12/2009		
McDonald Ronald	£2,000.00	One-off	00485728	03/12/2009		
Jones Peter	£100.00	One-off	00485634	03/12/2009	Building Fund	
Anonymous	£35.00	Voucher	00485681	03/12/2009	Building Fund	
Brown Joan	£80.00	One-off	00485727	03/12/2009	Building Fund	
	<b>£2,530.00</b>					

## on the way

**What the report shows:** Details of allocated gifts, which are in the process of being sent from your Stewardship account to your bank account.

Project: General funds, Building Fund Show extra columns: Giver, Amount, Type, Short ref View Report

1 of 1 100% Find | Next Select a format Export

General funds, Building Fund

- (Select All)
- General funds
- Building Fund

**Projects:** To obtain the details of your available balance for specific projects you can select the relevant project from the 'Project' dropdown menu. The report automatically shows allocated gifts to all projects.

Project: General funds, Building Fund Show extra columns: Giver, Amount, Type, Short ref View Report

1 of 1 100% Find | Next Select a format Export

Giver, Amount, Type, Short ref

- (Select All)
- Giver
- Giver title
- Giver forename
- Giver surname
- Amount
- Type
- Reference
- Short reference
- Allocation date
- Project
- Details
- Payroll giver
- Giver postcode
- Giver No.

The report automatically shows the following details:

**Giver, Amount, Type** (this is the type of allocated gift, i.e. voucher, regular etc.), **Short reference** (this is the first part of the allocated gift reference), **Allocation date** (the date the gift was allocated into your recipient account; this will be different from the date the grant is transferred into your bank account), **Project** (if you have set up a project this column will show which project the allocated gift was intended for), **Details** (this may include additional information, such as a reference).

You can also choose to see the following:

**Giver title, Giver forename, Giver surname, Reference** (this is the full allocated gift reference), **Payroll giver** (if the gift received has originated from a giver who pays into their giving account via a payroll giving scheme then 'Y' will appear), **Giver postcode, Giver No.** (the Giver's unique reference).



Report example:

## on the way

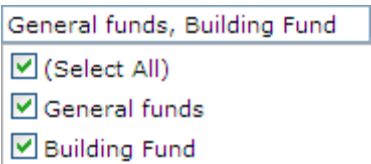
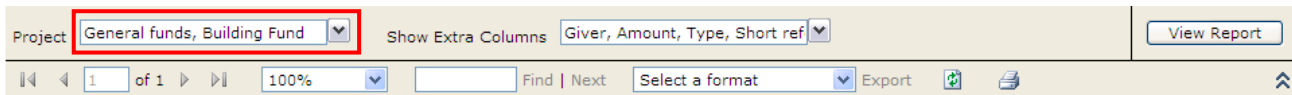


### Payments created but not yet paid

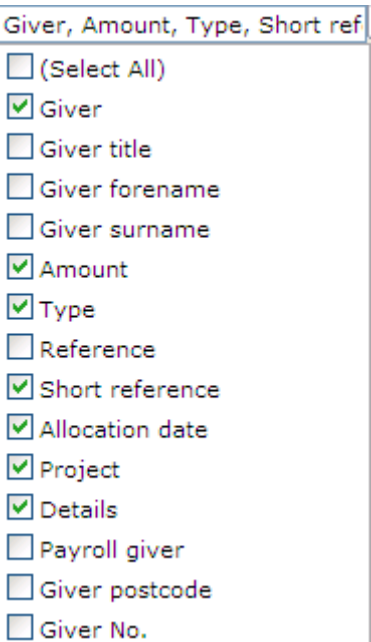
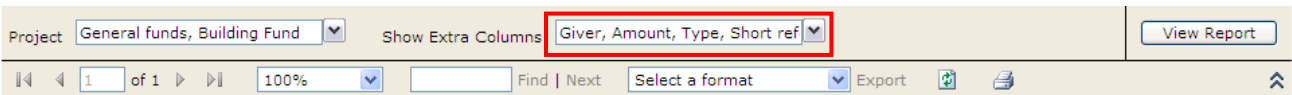
Giver	Amount	Type	Short reference	Allocation date	Project	Details
McDonald Ronald	£25.00	Voucher	00485682	03/12/2009		
Jones Peter	£30.00	Voucher	00485636	03/12/2009		
Green Theresa	£100.00	One-off	00485725	03/12/2009		
Smith Jane	£20.00	One-off	00485726	03/12/2009		
Brown Joan	£50.00	Voucher	00485666	03/12/2009		
McDonald Ronald	£2,000.00	One-off	00485728	03/12/2009		
Green Theresa	£60.00	Regular	00485724	03/12/2009		
Anonymous	£30.00	Regular	00485717	03/12/2009		
Anonymous	£35.00	Voucher	00485681	03/12/2009	Building Fund	
Brown Joan	£80.00	One-off	00485727	03/12/2009	Building Fund	
Jones Peter	£100.00	One-off	00485634	03/12/2009	Building Fund	
	<b>£2,530.00</b>					

# available

**What the report shows:** Details of allocated gifts, which are available for you to withdraw.



**Projects:** To obtain the details of your available balance for specific projects you can select the relevant project from the 'Project' dropdown menu.



The report automatically shows the following details:

**Giver, Amount, Type** (this is the type of allocated gift, i.e. voucher, regular etc.), **Short reference** (this is the first part of the allocated gift reference), **Allocation date** (the date the gift was allocated into your recipient account; this will be different from the date the grant is transferred into your bank account), **Project** (if you have set up a project this column will show which project the allocated gift was intended for), **Details** (this may include additional information, such as a reference).

You can also choose to see the following:

**Giver title, Giver forename, Giver surname, Reference** (this is the full allocated gift reference), **Payroll giver** (if the gift received has originated from a giver who pays into their giving account via a payroll giving scheme then 'Y' will appear), **Giver postcode, Giver No.** (the Giver's unique reference).



Report example:

## available balance



Giver ↕	Amount ↕	Type ↕	Short reference ↕	Allocation date ↕	Project ↕	Details ↕
Green Theresa	£100.00	One-off	00485725	03/12/2009		
Green Theresa	£60.00	Regular	00485724	03/12/2009		
Smith Jane	£20.00	One-off	00485726	03/12/2009		
Brown Joan	£80.00	One-off	00485727	03/12/2009	Building Fund	
Brown Joan	£50.00	Voucher	00485666	03/12/2009		
Anonymous	£30.00	Regular	00485717	03/12/2009		
Jones Peter	£100.00	One-off	00485634	03/12/2009	Building Fund	
Jones Peter	£30.00	Voucher	00485636	03/12/2009		
Anonymous	£35.00	Voucher	00485681	03/12/2009	Building Fund	
McDonald Ronald	£25.00	Voucher	00485682	03/12/2009		
McDonald Ronald	£2,000.00	One-off	00485728	03/12/2009		
<b>£2,530.00</b>						

# by tax year

**What the report shows:** Total grants made to you in a specified period.

**Date from/Date to:** This report automatically shows grants made to you during the previous tax year, although you can review grants sent since 1<sup>st</sup> January 2007. When inputting the date manually (without using the calendar), click View Report twice.

The screenshot shows a web interface for generating a report. It features two date input fields: 'Date from' with the value '06/04/2009' and 'Date to' with the value '05/04/2010'. Both fields have a calendar icon to their right. A red box highlights the 'Date from' field, and an arrow points from the text above to it. Another red box highlights the 'Date to' field, and an arrow points from the text above to it. To the right of these fields is a 'View Report' button. Below the date fields is a navigation bar with a page indicator '1 of 1', a zoom level of '100%', and options for 'Find | Next', 'Select a format', and 'Export'.

Report example:

## Total grant payments by tax year

you can change the date range above if your accounting year is not the tax year

Total grant payments from 06/04/2009 to 05/04/2010  
£11,327.56



# allocated gifts by type

**What the report shows:** The total gift allocations in each month, broken down by type (regular, one-off, reclaimed tax and voucher).

**What the chart shows:** A visual representation of the total amount of gift allocations in each month, apportioned by type.

**Date from/Date to:** This report automatically shows gifts allocated for the last year, although you can review gift allocations from 1<sup>st</sup> January 2007. When inputting the date manually (without using the calendar), click view report twice.

regular, one-off, voucher

- (Select All)
- regular
- one-off
- voucher

**Type:** The report and graph automatically show each type of allocated gift. If you would like to view the gift allocations for a particular type then just un-tick the gifts you do not want to include in the report and chart.

General funds, Building Fund

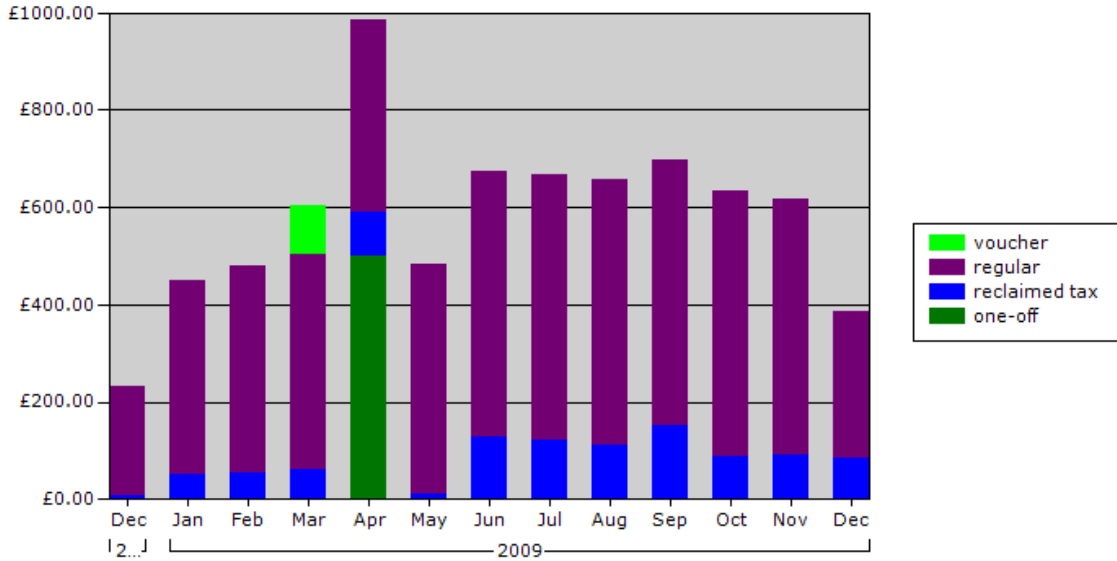
- (Select All)
- General funds
- Building Fund

**Project:** The report will automatically show the allocated gifts made to each project, however you can un-tick the projects you do not wish to see.

Report example:

allocated gifts by type

Type(s) regular; one-off; reclaimed tax; voucher



Year	Month	one-off	reclaimed tax	regular	voucher
2008	Dec		£6.09	£225.00	
2009	Jan		£49.93	£400.00	
	Feb		£53.58	£425.00	
	Mar		£60.89	£441.67	£100.00
	Apr	£500.00	£89.31	£396.67	
	May		£12.18	£471.45	
	Jun		£127.89	£546.45	
	Jul		£120.16	£546.45	
	Aug		£112.45	£546.45	
	Sep		£150.60	£546.45	
	Oct		£88.09	£546.45	
	Nov		£91.74	£526.45	
	Dec		£84.44	£301.67	

# monthly comparison

**What the report shows:** The total gifts allocated each month compared to previous years.

**What the chart shows:** A visual representation of the total gifts allocated each month compared to previous years.

**Date from/ Date end:** This report automatically shows gifts allocated during the previous 2 years, although you can review gift allocations from 1<sup>st</sup> January 2007. When inputting the date manually (without using the calendar), click view report twice.

regular, one-off, voucher

- (Select All)
- regular
- one-off
- voucher

**Types:** The report and graph automatically show each type of allocated gift. If you would like to view the gift allocations for a particular type then just un-tick the gifts you do not want to include in the report and chart.

General funds, Building Fund

- (Select All)
- General funds
- Building Fund

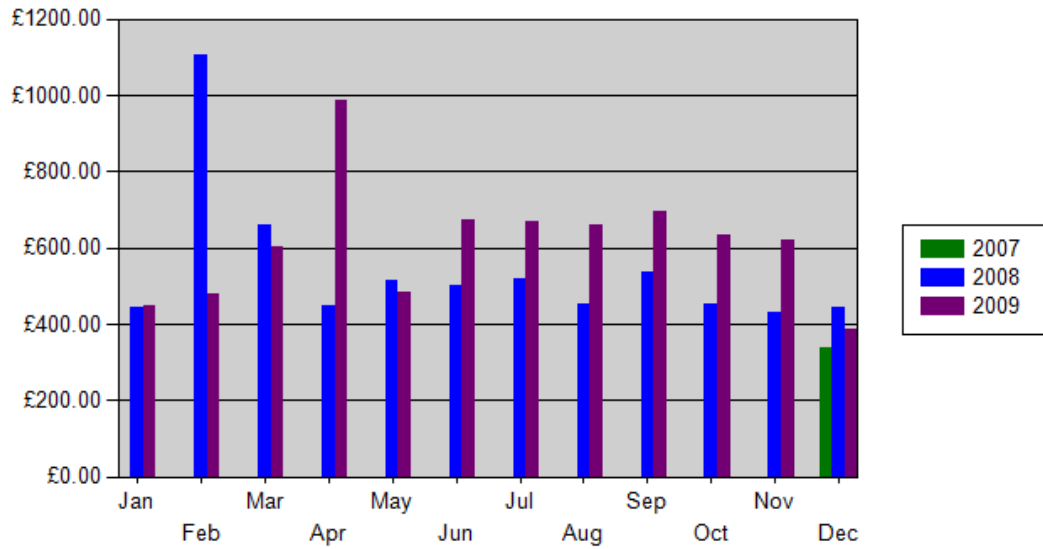
**Project:** The report will automatically show the allocated gifts made to each project, however you can un-tick the projects you do not wish to see.

Report example:

## monthly comparison of allocated gifts



Gift type(s) regular; one-off; reclaimed tax; voucher in project(s) General funds



	2007	2008	2009
<b>Jan</b>		£442.37	£449.93
<b>Feb</b>		£1,106.79	£478.58
<b>Mar</b>		£659.48	£602.56
<b>Apr</b>		£450.00	£985.98
<b>May</b>		£515.25	£483.63
<b>Jun</b>		£503.07	£674.34
<b>Jul</b>		£517.75	£666.61
<b>Aug</b>		£454.36	£658.90
<b>Sep</b>		£535.95	£697.05
<b>Oct</b>		£451.21	£634.54
<b>Nov</b>		£429.93	£618.19
<b>Dec</b>	£337.37	£443.84	£386.11
<b>Total</b>	<b>£337.37</b>	<b>£6,510.00</b>	<b>£7,336.42</b>

# yearly comparison

**What the report shows:** The cumulative allocated gifts throughout a year, broken down by months and compared to previous year's cumulative figures.

**What the chart shows:** Cumulative allocated gifts shown by month and compared to previous years.

**Date from:** This report automatically compares gifts from 1 January 2007. You can change this date to a later date, but please keep in mind that for the most useful comparison the start date should be at the start of the year. When inputting the date manually (without using the calendar), click view report twice.

- General funds, Building Fund
- (Select All)
  - General funds
  - Building Fund

**Project:** The report will automatically show the allocated gifts made to each project, however you can un-tick the projects you do not wish to see.

- regular, one-off, voucher
- (Select All)
  - regular
  - one-off
  - voucher

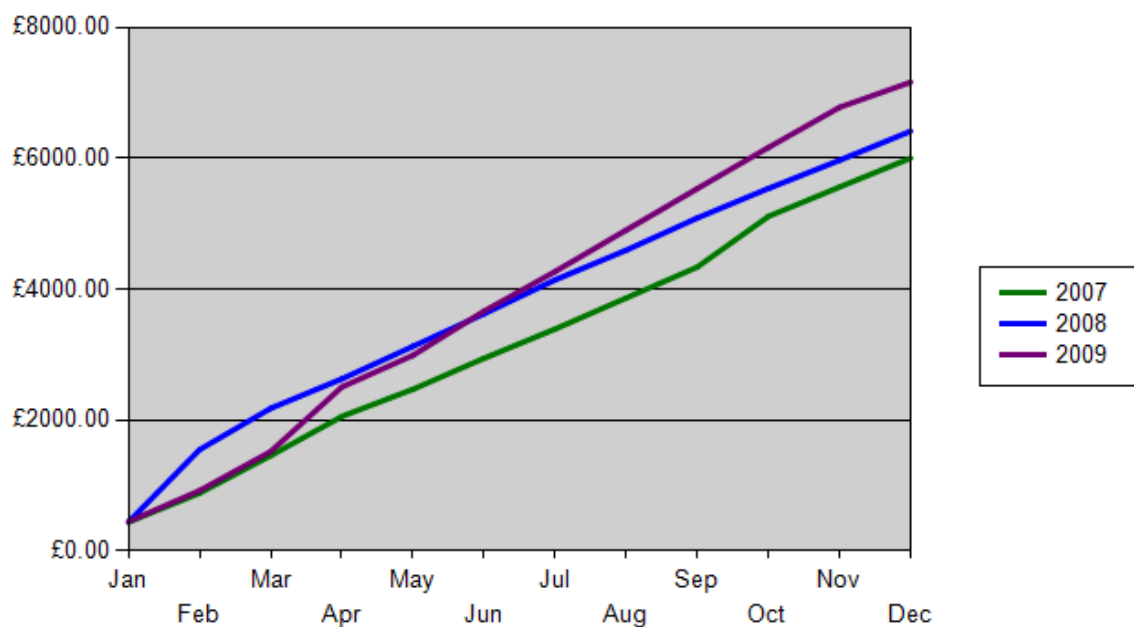
**Type:** The report and graph automatically show each type of allocated gift. If you would like to view the allocated gifts for a particular type then just un-tick the gifts you do not want to include in the report and chart.

Report example:

## cumulative comparison of allocated gifts



Project(s): General funds



	Month	Amount	Annual cumulative amount
2009	Jan	£449.93	£449.93
	Feb	£473.71	£923.64
	Mar	£596.47	£1,520.11
	Apr	£985.98	£2,506.09
	May	£483.63	£2,989.72
	Jun	£674.34	£3,664.06
	Jul	£606.53	£4,270.59
	Aug	£633.32	£4,903.91
	Sep	£633.32	£5,537.23
	Oct	£628.45	£6,165.68
	Nov	£613.32	£6,779.00
	Dec	£383.67	£7,162.67