

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	