



## 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

| C  SharePoint © Dioce My Givin  | mygiving.online/report/envelopenumbers<br>locese of Manche: 33 BBC - Home 🕐 The Guardian   | MyGiving Online      Northern     No     Na     Na     Na     Dashboard     Arimin     Arim     Arimin     Arimin     Arim     Arimin     Ar  | ional Rail 😰 Mail – paulbailey@r<br>Welcome: 15yste<br>Donors + Claims - 15the | the Logout   | This window will appear.  |
|---|--|--|--|--|---|
| nvelope Num   | pers   |  | Manchester DBF   | (Organisation)   |   |
| (PRACTIC) Practice Parish All Envelopes   | [PRACTIC] Practice P     Out-of-construction   | Varish 🔹   | nactive Envelopes  |  | Click here to restric<br>your view to see All<br>Envelopes.   |
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| 030   | Valeri   | e Barrie   | 16.<br>1   | _  |   |
| 109   | Edna   | Ashton   | No   |  |   |
| 110   | Edna   | Ashton   | Yes Var  |  |   |
| 15  | Peter  | Edwards  | ves  |  | Click on ↑↓ to  |
| 22  | Esme   | Rose   | Yes  |  | order vour view   |
| 25  | Elicab   | eth South  | Yes  |  | alphanumerically by   |
| 15  | jenny  | Eden   | Yes  |  |   |
| 56  | Claire   | Warren   | Yes  |  | Envelope Number,  |
| 56  | Clive !  | Froon  | Ves  | •  | Donor or Active.  |
| Generate Report Print   | abels O  |  |  |  |   |
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| OLGA (OnLine Gift Aid)<br>Envelope<br>56<br>66  | Envelope Numbers Report : Manchester DBF(0<br>Donor Comme<br>Calle Vienn<br>Olie Fron  | rganisation)<br>nt Active<br>Yes<br>Yes  | This<br>of the<br>doce   | s is an exar<br>ne PDF<br>ument  | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes                                      |
| OLGA (OnLine Gift Aid)<br>Envelope<br>56<br>66<br>110<br>109  | Envelope Numbers Report : Manchester DBF(O<br>Donor Comm<br>Caller Varian<br>Chie Fron<br>Edm-Anton  | rganisation)<br>Int Active<br>Vis<br>Vis<br>Vis<br>Vis<br>No   | This<br>of the<br>docu   | s is an exar<br>ne PDF<br>ument<br>duced wher  | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes                                      |
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| OLGA (OnLine Gift Act)<br>Envelope<br>56<br>56<br>110<br>109<br>25<br>22<br>66  | Envelope Numbers Report : Manchester DBF(O<br>Donor Comme<br>Catre Vamm<br>Citter Vamm<br>Citter Foon<br>Edm Anton<br>Edm Anton<br>Edm Anton<br>Edm Anton<br>Edm Rose<br>Finnds Rose<br>Finnds Rose  | Irganisation)<br>Int Active<br>Viss<br>Viss<br>Viss<br>No<br>Viss<br>Viss<br>Viss  | This<br>of the<br>proc<br>you<br>Gen   | s is an exar<br>ne PDF<br>ument<br>duced wher<br>click on<br>erate Repo                          | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes.                                     |
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| CILGA (OnLine Gift Aid)<br>Envelope<br>56<br>66<br>110<br>139<br>25<br>22<br>66<br>25<br>000<br>7<br>15<br>15<br>000  | Envelope Numbers Report : Manchester DBF(0<br>Donor Comme<br>Citate Viamm<br>Chare Viamm<br>Chare Noon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Edma Ankon<br>Hare Edma Hanod<br>Neah Amond<br>Neah Amond<br>Neah Amond<br>Neah Edma   | rganisation)<br>nt Active<br>Yes<br>Yes<br>No<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes   | This<br>of the<br>doct<br>proc<br>you<br>Gen<br>You<br>requ                    | s is an exar<br>ne PDF<br>ument<br>duced wher<br>click on<br>erate Repo<br>can print t<br>uired. | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes.                                     |
| OLGA (OrLine Gift Aid)<br>Envelope<br>66<br>65<br>110<br>109<br>25<br>22<br>26<br>25<br>000<br>7<br>15<br>15<br>000   | Envelope Numbers Report : Manchester DBF(0<br>Dener Comm<br>Clare Varian<br>Clare Varian<br>Edm Anhon<br>Edm Anhon<br>Edm Anhon<br>Edm Anhon<br>Edm Rose<br>Frands Rose<br>Anny Elan<br>John Barle<br>Kein Amond<br>Rein Fands<br>Valers Barle   | rganisation)<br>int Active<br>Yes<br>Yes<br>No<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes  | This<br>of the<br>docu<br>proc<br>you<br>Gen<br>You<br>requ                    | s is an exar<br>ne PDF<br>ument<br>duced wher<br>click on<br>erate Repo<br>can print t<br>uired. | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes.                                     |
| OLGA (OnLine Gift Aid)<br>Envelope<br>56<br>56<br>115<br>109<br>25<br>22<br>26<br>25<br>000<br>7<br>15<br>15<br>15<br>000   | Envelope Numbers Report : Manchester DBF(O<br>Donor Comme<br>Caller Varian<br>Chie Fron<br>Edma Anton<br>Edma Anton<br>Edma Anton<br>Edma Robe<br>Fransis Rosal<br>Jahn Barle<br>Yesh Amond<br>Neter Rosa<br>Manne<br>Yesh Amond<br>Neter Edmands<br>Valere Barle  | Int Active Int Yes Yes No No No Yes  | This<br>of th<br>doct<br>proc<br>you<br>Gen<br>You<br>requ                     | s is an exar<br>ne PDF<br>ument<br>duced wher<br>click on<br>erate Repo<br>can print t<br>uired. | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes.<br>nple<br>n<br>ort.<br>:his if     |
| CLGA (Online Gift Ais)<br><b>Envelope</b><br>56<br>66<br>110<br>109<br>25<br>22<br>26<br>23<br>23<br>25<br>15<br>15<br>15<br>15<br>030  | Envelope Numbers Report : Manchester DBF(O<br>Donor Comme<br>Calle Vitem<br>Calle Vitem<br>Calle Vitem<br>Calle Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Edra Anton<br>Calle Vitem<br>Rose<br>Fransis Rosai<br>Jany Barle<br>Hosh Amond<br>Neter Barle<br>Videre Barle   | krganisation)<br>Int Active<br>Yes<br>Yes<br>No<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes<br>Yes  | This<br>of the<br>proc<br>you<br>Gen<br>You<br>requ                            | s is an exar<br>ne PDF<br>ument<br>duced wher<br>click on<br>erate Repo<br>can print t<br>uired. | a PDF document<br>showing All<br>Envelopes, Active<br>Envelopes or<br>Inactive Envelopes.<br>nple<br>n<br>ort.<br>this if     |

- 2. Adding a donor's active envelope numbers
- Step 1



| <mark>⊁</mark> MyGi | ving. <mark>Online</mark> |                 | Dashboard > A   | dmin + Donor | Welcome: TSystem  | Reports >     | You can also add a<br>donor's envelope |
|---------------------|---------------------------|-----------------|-----------------|--------------|-------------------|---------------|--|
| ivelopes            |                           |                 |                 |              | manchester DBF (C | Organisation) | number on a Dono<br>Record.            |
| dd New +            | IIC] Practice Parish      | *               |                 |              |                   |               |  |
| arch:               | Exact Match               |                 |                 |              | Show 10           | * entries     |  |
| nvelope Number      | IA Donor                  | IT Organisation | 11 Charity      | 11 Active    | IT Actions        |               |  |
| 30                  | Valerie Barrie            | Manchester DBF  |                 | Ves          |                   |               |  |
| 09                  | Edna Ashton               | Manchester DBF  | Practice Parish | No           | Edit CZ Delete B  |               |  |
| 10                  | Edna Ashton               | Manchester DBF  |                 | Yes          | Edit G? Delete 8  |               |  |
| 5                   | Kevin Almond              | Manchester DBF  |                 | Yes          | Edit Gr Delete 😫  |               |  |
| 5                   | Peter Edwards             | Manchester DBF  |                 | Ves          | Edit 127 Delete 😫 |               |  |
| 2                   | Esme Rose                 | Manchester DBF  |                 | Ves          | Edit 🕼 Delete 🛱   |               |  |
| 5                   | Elizabeth South           | Manchester DBF  |                 | Yes          | Edit 🕼 Delete 🕏   |               |  |
| 5                   | Jenny Eden                | Manchester DBF  |                 | Ves          | Edit 🕼 Delete 🕫   |               |  |
|                     | Claire Warren             | Manchester DBF  |                 | Ves          | Eng Dr. During    |               |  |

• Step 4

| Envelopes                 | Add Envelope               |                 |                 | X          | Manduation           | ) |
|---------------------------|----------------------------|-----------------|-----------------|------------|----------------------|---|
| Add New 🕈                 | Donor Name                 | Select Donor    |                 | ٠          |                      |   |
| Rter: IPRACI              | C Prestoe Paris<br>Comment | 1               |                 |            |                      |   |
| Search<br>Envelope Number | G Exect h Active           | ×               |                 |            | Show is + entres.    |   |
|                           | John                       |                 | O Can           | rel Save O | Ext Of Bolton        |   |
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| 25                        | Elgabeth South             | Manchester DBF  |                 | Ves        | Edit DE Digitale R   |   |
|                           | jenny Eden                 | Manchester DBE  |                 | Ves        | Cort C# Dolete 18    |   |
| 56                        | Claire Warren              | Manchester DBF  |                 | Yes        | Edit 121 Delete @    |   |

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

|       | Add Envelope | ×   |           |
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| l     | Donor Name   | Select Donor  | p<br>c    |
|       | Envelope #   | Select Donor  Almond, Kevin (Branch - Practice Parish) Actors Edua (Branch - Bractice Parish)   | l le<br>t |
| Paris | Comment      | Bailey, Paul (Branch - Practice Parish)<br>Barrie, John (Branch - Practice Parish)  | C         |
| ict N | Active       | Barrie, Valerie (Branch - Practice Parish)<br>Braintree, Jonny (Branch - Practice Parish)<br>Bruce, Robert (Branch - Practice Parish) |           |
| Donc  |              | Bush, Rose (Branch - Practice Parish)<br>Candy, Flossie (Branch - Practice Parish)  |           |
|       |              | Edwards, Peter (Branch - Practice Parish)<br>Emerald, James (Branch - Practice Parish)<br>Froon. Clive (Branch - Practice Parish)     |           |
|       |              | Inger, Jane (Branch - Practice Parish)  |           |
| idna  | Ashton       | M Rose, Esme (Branch - Practice Parish)   |           |
| Edna  | Ashton       | M Rowley, Margaret (Branch - Practice Parish)<br>Powley, William (Branch - Practice Parish)   |           |
| (evin | Almond       | N South, William Charles (Branch - Practice Parish)   |           |

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

|                      | Add Envelope   | × The selected   |
|----------------------|--|--|
|                      | Donor Name   | Ashton, Edna (Branch - Practice Parish)  |
|                      | Envelope #   | <sup>015</sup> number you'd like<br>to enter. Don't                                |
| Paris                | Comment  | forget to enter in a<br>uniform three or   |
| act N                | Active   | ✓ four digit manner<br>(e.g. 020 or 0020)<br>if you'd like to                      |
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| Yc<br>co<br>er<br>wi | ou can add a<br>omment about t<br>ovelope if you<br>ish. | his Click on Save to store your changes.   |

| C Secure https://       | www.mygiving.online/envelope |                         |                         |                        |                          |                   |
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| nvelopes                |                              |                         |                         |                        |                          | also be able to   |
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| 030                     | John Barrie                  | Manchester DBF          |                         | Yes                    | Edit 🕼 Delete 🛱          |                   |
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- 3. Editing a donor's active envelope numbers
- Step 1

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| nvelopes        |             |                         |      |                |     |                |         |          | Man      | nchester DBF (K | Organisation) |                                      |          |
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| 030             |             | Valerie Barrie          |      | Manchester DBF |     |                |         | Yes      | East     | Delas           |               | <ul> <li>amond the envolu</li> </ul> | n        |
| 109             |             | Edna Ashton             |      | Manchester DBF |     | Practice Paris | h       | No       | East GP  | Delete 🖻        |               |                                      | γγ<br>or |
| 110             |             | Edna Ashton             |      | Manchester DBF |     |                |         | Ves      | Edit GP  | Delete 🔒        |               |                                      | U        |
| 15              |             | Kevin Almond            |      | Manchester DBF |     |                |         | Yes      | East     | Delete 8        |               | of your choice.                      |          |
| 15              |             | Peter Edwards           |      | Manchester DBF |     |                |         | Ves      | Edit     | Delete 😫        |               |                                      | -        |
| 22              |             | Esme Rose               |      | Manchester DBF |     |                |         | Ves      | Edit GP  | Delete R        |               |                                      |          |
| 25              |             | Elizabeth South         |      | Manchester DBF |     |                |         | Yes      | EatOr    | Delete 🛊        |               |                                      |          |
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| 56              |             | Claire Warren           |      | Manchester DBF |     |                |         | Ves      | See 12   | -               |               |                                      |          |

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| ct N | Donor Name    | Ashton, Edna (Branch - Practice Parish) |                   | a three or four digit<br>one by typing it<br>here. |
| onc  | Envelope #    | 015                                     | 11                |  |
| dna  | Comment       |   |                   | If you wish to make<br>the envelope                |
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| Giving Online - Index X<br>C A Secure   https://V<br>s SharePoint © Dioce | www.mygiving.online/envelope | Home 🌘 The Guardian 👙             | MyGiving Online 🔕 Northern    | 💽 National Rail 🔯 | Mail – paulbailey©∴ | *                         | A Success message                                  |
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| 030   | John Barrie                  | Manchester DBF                    |                               | ves               | Edit 18 Delete B    | 1.                        |  |
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| 109   | Edna Ashton                  | Manchester DBF                    | Practice Parish               | No                | Edit Gr annual de   |                           |  |
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envelopes entered in a uniform three digit format, they

appear in a

descending number order.