

Gift Aid

Platform Luminate Online

Module Online Fundraising and TeamRaiser

Configuration Feature is automatically available to clients configured with the UK as the locale. Some setup is required.

Our team is committed to helping you get the most out of every relationship and inspire your creativity to deliver engaging experiences for your constituents so you can do even more for your mission. The Summer 2012 release of Convio Luminate™ is packed with enhancements designed to connect more people to your cause, enhance the user's experience, allow you to better measure and test your strategies, and offer new ways to deliver web-based content and leverage our open platform – all while making optimal use of your staff's valuable time.

This document describes the feature “Gift Aid”, explains how to configure and use it, and offers tips for taking full advantage of its benefits. Please visit the [release resource center](#) to read more about the exciting features in this release.

OVERVIEW

This feature provides enhanced support for the capture of Gift Aid declarations on donation forms that are used for either direct donations to an organization or to a TeamRaiser event. The new functionality enables organizations to capture the declaration and clarify eligibility of Gift Aid for an individual donation. It will also help organizations better market the value of Gift Aid to TeamRaiser events and make the Gift Aid declarations available for download to the organisations's database of record for reporting to the HMRC.

FEATURES AND BENEFITS

Features

- ✓ Increasing the flexibility that clients have over where and how the Gift Aid declaration appears
- ✓ Adding display of added Gift Aid value to constituent-facing pages in TeamRaiser
- ✓ Improving tracking of Gift Aid eligibility for an individual gift

Benefits

- ✓ The constituent user interfaces for Gift Aid declarations will be based on the latest best-practices.

- ✓ Clients will have more flexibility to display Gift Aid according to their own internal business rules
- ✓ Increased Gift Aid opt-ins will result in higher revenue for UK charities

COMMON SCENARIOS

The changes to Gift Aid will improve the user experience for Site and TeamRaiser Event Administrators, TeamRaiser Event Managers, and constituent donors and TeamRaiser participants in the following ways:

- When a Site or TeamRaiser Event Administrator configures a gift donation form, they can choose to implement a “single checkbox” Gift Aid declaration or add checkboxes for the donor to designate why their gift is ineligible for Gift Aid.
- When a Site or TeamRaiser Event Administrator, Event Manager, or TeamRaiser participant enters or uploads an offline donation for a TeamRaiser event, they can now indicate if that gift is eligible for Gift Aid.
- When downloading transaction information for a donation, Site Administrators can identify if the donor made a universal Gift Aid declaration and/or indicated that an individual donation was eligible for Gift Aid.
- Throughout TeamRaiser, cumulative totals displayed to indicate the amount of funds raised for the event, by a specific team, or by a specific participant, the added value being provided by Gift Aid will also display next to that cumulative amount.

CONSIDERATIONS

Support for Gift Aid in “top up” donations made at the time of TeamRaiser registration

TeamRaiser offers the ability for organizations to accept “top up” donations at the time that a participant is registering for a TeamRaiser Event. At this time, it is not possible to capture a Gift Aid declaration for this type of donation.

UK Only

Gift Aid is only available on instances of Luminate Online which are configured with UK as their locale.

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Making Gift Aid Available on a Site

A site configured for UK automatically has the Gift Aid feature enabled, which means that:

- Site Administrators can insert a Gift Aid component to donation forms to make the Gift Aid declaration available to constituents who make donations to your organization, including team fundraising events.
- Site Administrators, TeamRaiser Administrators, TeamRaiser Event Managers with the appropriate permissions, can enter gifts with Gift Aid declarations that are received offline, and if allowed (controlled by site and event options), TeamRaiser participants can also enter cash and check gifts that donors give or promise to them.
- Site Administrators, TeamRaiser Event Administrators, and TeamRaiser Event Managers with the appropriate permissions can upload gifts with Gift Aid declarations in bulk and confirm gifts with Gift Aid declarations entered manually offline.
- Calculated match rates are based on the tax rates of the HMRC and will be updated appropriately in the system when the HMRC releases revised rates.

Enabling the Gift Aid Option for Offline Gifts in a TeamRaiser Event

You must set an Advanced Event Option in the TeamRaiser configuration to allow TeamRaiser Event Administrators, Event Managers, and participants to click the Gift Aid checkboxes (on behalf of the donor) when they enter gifts the donor gives or sends them. You can also customize the text to display with the Gift Aid checkbox on offline gift entry forms.

1. From an Administrator page, click **Fundraising > TeamRaiser**.



2. From the TeamRaisers list page, click **Edit** from the **Actions** column of the appropriate TeamRaiser event

TeamRaiser List | Cross-Event Teams | Registration Upsells | Event Management

TeamRaiser List

Create a TeamRaiser

Create Many TeamRaisers

This is the list of TeamRaiser events created for your site. Use the Edit action to view and edit details for a TeamRaiser. Use the Manage action to work with participants involved in a TeamRaiser as well as create and send emails to coach people who are involved. Use the Show Archived action to remove a TeamRaiser from view in this list, and use the Show Archived TeamRaisers in the list again. To create a new TeamRaiser, click Create a TeamRaiser.

TeamRaisers

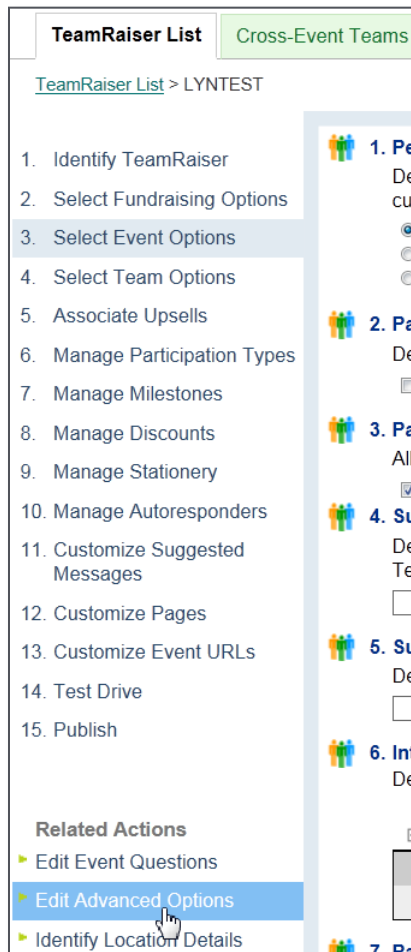
Records 1 - 4 of 4 | [First](#) | [Previous](#) | [Next](#) | [Last](#)

Search

Show All

TeamRaiser Name	Action	Status
TEST ID: 1003	Edit Manage	Accepting Registrations and Gifts Published Date: June 04, 2012 Unpublished Date: N/A

3. From the tasks along the left on the **Identify TeamRaiser** page, click **Select Event Options**.
4. From the **Related Actions** section on the **Select Event Options** page, click **Edit Advanced Options**.



5. On the **Define Fundraising Options** page, scroll to the step containing the words “**Gift Aid for Online Gifts**”.
6. Click the **Yes, allow Gift Aid to be declared for offline gifts** checkbox.
7. Optionally modify the text entered in the Gift Aid field below the checkbox.

TeamRaiser List | Cross-Event Teams | Registration Upsells | Event Management Settings | Uploads | Participant Centers

[TeamRaiser List](#) > [LYNTTEST](#) > Edit Advanced Options

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
 - a. Define Fundraising Options
 - b. Define Event Options
 - c. Define Misc Options
 - d. Configure Participant Center Override Options
4. Select Team Options
5. Associate Upsells

1. Offline Gift Recording by Participants:

Determines if participants can enter offline gifts that donors give to them and if they can view the gifts they enter (Note: The value of these offline gifts may not display in the funds raised amounts depending on the setting for the "Fundraising Totals Include Unconfirmed Gifts" option.)

☒ **Yes, allow participants to record offline gifts that donors give them**

7. Gift Aid for Offline Gifts

Determines if administrators, event managers, and participants can declare Gift Aid for offline gifts they are entering

☒ **Yes, allow Gift Aid to be declared for offline gifts**

The donor is a UK taxpayer, and this donation qualifies for Gift Aid.

8. Scroll to the bottom of the page and click **Save**.

Inserting the Gift Aid Component on a Donation Form

The standard Gift Aid component displays as a section within a UK donation form as shown in the following.

1 Gift & Payment Information — **2 Review Gift**

Gift Information

*Select Gift Amount:

+£0.00 if Gift Aid is added

Payment Information

Gift Aid:

If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme.

☐ I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice.

Credit Card Type:

*Credit Card Number:

*CVV Number: [What is this?](#)

*Expiration Date: 06 2012

The default configuration of the templates for the **UK Credit Card Donation Form** and **UK Direct Debit Donation Form** include this component. However, you may need to add it to an existing form or another type of form that you configure.

Donation Management

Online Giving | **Donation Classic** | **Pending Contributions** | **Sustaining Gifts** | **Designated Giving** | **Membership Types** | **Donation Reports** | **General Conf**

[Campaigns](#) > [giftaid](#) > Create a Donation Form

1. Select a name for your new Donation Form.

2. Select a Donation Form Template to Use

Related Actions

► [Import Template](#)

Help me choose a template

This is a list of the templates that you can use as a starting point for your form. Choose the template that most closely resembles the purpose for your form, such as providing for TeamRaiser or Tribute donations or allowing for installment or sustainer donations. You will be able to customize the template to add or remove features if you need to.

- Form Templates -

Template Name	Actions	Description
Basic Donation Form (2	Preview Select	The Basic Form includes the minimum data elements necessary to process a transaction using
UK Credit Card Donation Form	Preview Select Export Template	The UK Credit Card Donation Form includes the minimum data elements necessary to process a credit card transaction using the Standard Donation Level element.
UK Direct Debit Donation Form	Preview Select Export Template	The UK Direct Debit Donation Form includes the minimum data elements necessary to process a direct debit transaction using the Forever Sustainer Donation Level element.

You can customize the text displayed for the Gift Aid Declaration checkbox. You can also enable options for donors to select if they would like to make a Gift Aid declaration but this specific gift is not eligible to be gift aided.

The screenshot shows a form titled "1 Gift & Payment Information" with a sub-header "Gift Information". It includes a "Select Gift Amount" field, a "+£0.00 if Gift Aid is added" note, and a "Gift Aid:" section. The text explains that UK taxpayers can increase their donation value by at least 25% under the Gift Aid scheme. There are four checkboxes: "I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice." (checked), "I am donating on behalf of a corporation, group or someone else.", "I am related to the participant.", and "I am receiving a product or service in return." A "giftaid it" logo is also visible.

- ✓ The gift ineligibility checkboxes do not display unless the Gift Aid Declaration checkbox is checked. You can make the Declaration checkbox checked by default to have the ineligibility options displayed by default.

After creating a new donation form or if you are editing an existing form:

1. On the **Design Donor Screens** page, click **Edit** from the **Actions** column of the donation form.

- ✓ To display the Design Donor page, click *Fundraising > Donation Management > All Donation Forms > Edit*.

The screenshot shows the "Donation Management" interface. It has tabs for "Online Giving", "Donation Classic", "Pending Contributions", "Sustaining Gifts", and "Design Donor Screens". The "Design Donor Screens" tab is active, showing a list of end-user pages. A sidebar on the left lists steps: 1. Identify Donation Form, 2. Configure Donation Levels, 3. Design Donor Screens (highlighted), 4. Validate, 5. Configure Autoresponders, 6. Test Drive, 7. Publish. Below the sidebar, there are "Related Actions" like "Customize Look and Feel" and "Configure Service Center". The main content area shows a table of donor screens with columns for Name, Actions, and Status.

Name	Actions	Status
Splash Page	Edit Publish	✗ Not using this page
Donation Form	Preview Edit	■ Using default content
Thank You Page	Preview Edit	■ Using default content

- In the **Arrange the order of the elements** pane (on the right), position your cursor below the element that the Gift Aid data element follows on the form.

Donation Management

Online Giving | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations

Campaigns > giftaid > TeamRaiser2 > Donation Form

- Identify Donation Form
- Configure Donation Levels
- Design Donor Screens
 - Donation Form
- Validate
- Configure Autoresponders
- Test Drive
- Publish

The Form Designer shows the data elements that are already on your form in the window at the right; additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

Select data elements to include in this form:

- Billing Middle Name
- Billing Suffix
- Public Recognition Fields**
 - Anonymous Donation
- Payment Fields**
 - Gift Aid (UK)
 - Captcha
- Joint Donor Information Fields**

Buttons: New, Edit, Delete

Arrange the order of the selected data elements:

Page #1

- Section Header
- Standard Donation Level
- Section Header
- Payment Type
- Section Header
- Billing Title

Buttons: Add >, < Remove, Save Order and Edit Selected

English (United Kingdom) | English (United States) | English (Canada) | French (Canada) | Spanish (United States)

Previous Data Element | Next Data Element

Edit Data Element | Preview Data Element

- In the **Select Data Elements** pane, scroll to the Payment Fields, click **Gift Aid (UK)** and then click **Add**. (You can change the position later using the arrows on the ORDER bar.)

Select data elements to include in this form:

- Billing County
- Billing Postcode
- Public Recognition Fields**
 - Anonymous Donation
- Payment Fields**
 - Gift Aid (UK)
 - Captcha
- Joint Donor Information Fields**

Buttons: New, Edit, Delete

Arrange the order of the selected data elements:

Page #1

- Section Header
- Standard Donation Level
- Billing Title
- Billing First Name
- Billing Middle Name
- Billing Last Name
- Billing Suffix
- Billing Address 1

Buttons: Add >, < Remove, Save Order and Edit Selected

- Click the **Add >** arrow in the middle of the pane to move it.

Select data elements to include in this form:

- Billing County
- Billing Postcode
- Public Recognition Fields**
 - Anonymous Donation
- Payment Fields**
 - Gift Aid (UK)
 - Captcha
- Joint Donor Information Fields**

Buttons: New, Edit, Delete

Arrange the order of the selected data elements:

Page #1

- Section Header
- Standard Donation Level
- Billing Title
- Billing First Name
- Billing Middle Name
- Billing Last Name
- Billing Suffix
- Billing Address 1

Buttons: Add >, < Remove, Save Order and Edit Selected

5. Click **Save Order and Edit Selected**.

The screenshot shows a configuration interface for a form. On the left, under 'Select data elements to include in this form:', there are categories like 'Billing Address', 'Public Recognition Fields', 'Payment Fields', and 'Joint Donor Information Fields'. In the center, there are 'Add >' and '< Remove' buttons. On the right, under 'Arrange the order of the selected data elements:', a list of elements is shown for 'Page #1', including 'Standard Donation Level', 'Gift Aid (UK)', 'Section Header', 'Billing Title', 'Billing First Name', and 'Billing Middle Name'. At the bottom right, a button labeled 'Save Order and Edit Selected' is highlighted with a mouse cursor. Below the main configuration area, there are tabs for different languages: 'English (United Kingdom)', 'English (United States)', 'English (Canada)', 'French (Canada)', and 'Spanish (United States)'. At the very bottom, there are buttons for 'Edit Data Element' and 'Preview Data Element'.

6. To look at the form with the default elements, click **Preview** from the bottom of the page.

The screenshot shows a preview of the form. The top section is titled 'Gift Information'. It contains a label '*Select Gift Amount:' followed by a text input field. Below this, it says '+£0.00 if Gift Aid is added'. There are three numbered callouts: (1) points to the 'Gift Aid:' label; (2) points to a paragraph of text: 'If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme.'; and (3) points to a checkbox with the text 'I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice.' A handwritten note 'giftaid it' is written next to callout (2). The bottom section is titled 'Payment Information'.

7. To customize the component, in the **Edit Data Element** pane on this page, for

- a. **Section Label** (1), make any necessary changes to the text.
- b. **Gift Aid Description** (2), to:
 - Hide the description or hint that displays on the donation form with the Gift Aid section label, click the checkbox.
 - Change or add information, click into the editor and make your modifications.
- c. **Gift Aid Declaration** (3), modify the text that displays to the right of the checkbox. (no formatting).
- d. **Default state** checkbox (4), click the checkbox to display the checkbox with a checkmark.

👉 This is especially important if you want to display the gift ineligibility checkboxes.

Edit Data Element
Preview Data Element

*** 1. Section Label:**
This label will display on the donation form screen and transaction summary.

2. Gift Aid Description:
Introduce Gift Aid and/or provide a link to learn more.
☒ **Yes, display the Gift Aid Description on the form**

Use Plain Text Editor
Help

If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme.

*** 3. Gift Aid Declaration:**
Checkbox Option Text

Default State
☒ **Yes, this field is selected by default**

8. For the **Gift Aid Ineligible Reasons**, click the appropriate checkbox and then modify the checkbox text if necessary (By default, these statements do not display until the Gift Aid eligibility declaration checkbox contains a checkmark. If you do not click the Default State checkbox, these items remain hidden until the donor clicks the checkbox.)

- 4. Gift Aid Ineligible Reason 1: On behalf of others**
☐ **Yes, include this field on the form**

5. Gift Aid Ineligible Reason 2: Related to participant
☐ **Yes, include this field on the form**

6. Gift Aid Ineligible Reason 3: Receiving something in return
☐ **Yes, include this field on the form**

9. When you are finished, click **Save**.

10. To be sure the Gift Aid component is formatted properly:

- a. Click the **Preview Data Element** tab.

The screenshot shows the top of the Gift Aid (UK) form. At the top are buttons for 'New', 'Edit', 'Delete', and 'Save Order and Edit Selected'. Below these are tabs for language selection: 'English (United Kingdom)', 'English (United States)', 'English (Canada)', 'French (Canada)', and 'Spanish (United States)'. The 'English (United Kingdom)' tab is active. Below the language tabs are links for 'Previous Data Element' and 'Next Data Element'. The main content area has two tabs: 'Edit Data Element' and 'Preview Data Element'. The 'Preview Data Element' tab is selected, and a mouse cursor is clicking on it. Below the tabs, the text '* 1. Section Label:' is visible.

- b. Check to be sure the:
- Text and labels look correct.
 - Default State checkbox contains a checkmark if you clicked it.
 - Gift Ineligible reasons display if you have configured them and the Default State checkbox contains a checkmark.

This screenshot shows the 'Preview Data Element' tab of the Gift Aid (UK) form. The form contains the following text: 'Gift Aid:', 'If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme.', and a checkbox labeled 'I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice.' which is checked. There is a handwritten 'giftaid it' next to the text. To the right of the form, there are two green annotations with arrows pointing to the form: 'Previewing the default element with no Ineligible Reasons enabled OR without the Default State checkbox clicked.' and 'Previewing the element with the Default State checkbox clicked and Ineligible Reasons enabled'. Below the main form, there is a smaller 'Preview Data Element' window showing the same form content, but with an additional checkbox labeled 'I am donating on behalf of a corporation, group or someone else.' which is unchecked. A green annotation 'Scroll to see all Ineligible Reasons enabled' with an arrow points to the bottom of this smaller window. The 'Next Data Element' link is at the bottom right.

- c. To make modifications, click the **Edit Data Element** tab and refer to the previous steps.

11. To display the entire donation form to view the Gift Aid component in the Payment Information area:

- a. Click **Preview** (at the bottom of the page) and check to be sure the form is correct.
- b. If you need to make any modifications, click the **Edit Data Element** tab and refer to the previous steps.

12. When you are done adding data elements, click **Finish** (at the bottom of the Data Elements page).

Making an Online Donation

After a person clicks a link on the site or in an email to make a donation, they enter or select a gift amount and then click **Gift Aid** checkbox to declare their Gift Aid eligibility.

Main Menu My Account TeamRaisers Survey Stores English (en GB)

1 Gift & Payment Information ————— **2 Review Gift**

Gift Information

*Select Gift Amount:

+£12.50 if Gift Aid is added

Gift Aid:

If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme. *giftaid it*

☒ I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice.

Payment Information

If the Ineligible Reasons are displayed, the donor can click the appropriate reason for the exception

Main Menu My Account TeamRaisers Survey Stores English (en GB)

1 Gift & Payment Information ————— **2 Review Gift**

Gift Information

*Select Gift Amount:

+£12.50 if Gift Aid is added

Gift Aid:

If you are a UK taxpayer, the value of your donation can increase by at least 25% under the Gift Aid scheme. *giftaid it*

☒ I am a UK taxpayer. Please treat all qualified donations I make or have made to this organisation for the past four years as Gift Aid donations until further notice.


☐ I am donating on behalf of a corporation, group or someone else.

☐ I am related to the participant.

☐ I am receiving a product or service in return.

Payment Information

After clicking **Next**, the donor reviews the **Transaction Summary** to view Gift Aid details in the **Gift Information** section and then clicks **Process**.

[Main Menu](#) [My Account](#) [TeamRaisers](#) [Survey](#) [Stores](#) [English \(en_GB\)](#) 

1 Gift & Payment Information

2 **Review Gift**

Transaction Summary

Transaction Date:	01/06/12
-------------------	----------

Gift Information

Amount:	£50.00
Gift Aid:	£12.50

Payment Information

Payment type:	Credit Card
Credit Card Number:	*****1111

Personal Information

Title:	
First Name:	Pat
Last Name:	Brown
Email Address:	Pat@convio.com
Email opt-in:	Yes

Address Information

Country:	United Kingdom
Postcode:	HP5 1HY
Address 1:	1 Old Bells Court
Address 2:	Church Street
Address 3:	
Town:	Chesham
County:	Buckinghamshire

Previous

Process

Cancel

The donor reviews the Gift Aid detail in the **Gift Information** section of the **Donation Confirmation** page and prints it for a receipt.

Main Menu	My Account	TeamRaisers	Survey	Stores	English (en_GB) 
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Dear Pat,

We are deeply grateful for your generosity and support of our efforts. Your gift makes a difference — it enables us to provide vital services to the community we serve. We count on you and people like you to ensure that we can continue providing these services.

Once again, thank you for your support.

Sincerely,
Run For Your Life Administrator

Please print the following for your records:

Transaction Summary	
Transaction Date:	01/06/12
Gift Information	
Amount:	£50.00
Gift Aid:	£12.50
Payment Information	
Payment type:	Credit Card
Credit Card Number:	*****1111
Personal Information	
Title:	
First Name:	Pat
Last Name:	Brown
Email Address:	patbrown@friends.net
Email opt-in:	Yes
Address Information	
Country:	United Kingdom
Postcode:	HP5 1HY
Address 1:	1 Old Bells Court
Address 2:	Church Street
Address 3:	
Town:	Chesham
County:	Buckinghamshire
Tracking Code:	210-1004-1-1035-1036

[Return to our Home Page](#)

Later, the donor checks email and opens the Thank You autoresponder email, which contains the Gift Aid detail.

Dear Pat,

Thank you for supporting one of our volunteer fundraisers. Your generous gift will make us successful.

If you would like to participate or learn more about our cause and other opportunities to support us, please visit our Web site at www.RFYL2012.com.

Sincerely,

Test Site

Please print or save this message for your personal records.

Event/Donation Form: TeamRaiser Event 2012

In Support Of: Run For Your Life 2012 World Event

Date: 01-Jun-2012 22:01:50

Amount: £50.00

Gift Aid: £12.50

Tracking Code: 210-1004-1-1035-1036

Uploading Gift Aid-Designated Gifts in Bulk

A TeamRaiser Site or Event Administrator and Event Manager with the appropriate permissions can upload gifts in bulk with the Gift Aid designation and amounts.

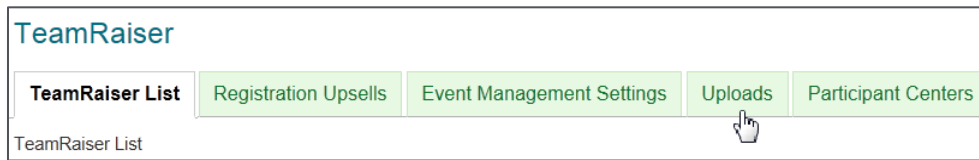
Uploading a Gift File in the Administrator Interface

The upload file must be prepared in advance in the comma-separated values (csv) format for upload and can require certain fields. From the Uploads page, you can:

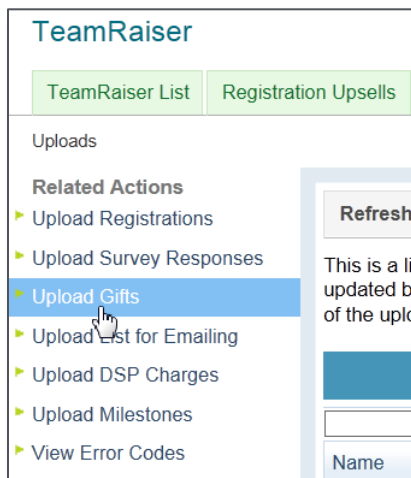
- [Create the file](#) using a sample .csv gift upload file
- [Define the required fields](#) that must be in the upload file and must contain a non-null value
- [Name and upload the file](#) to send the file to the Upload queue for processing

Creating a File Using the Sample CSV Gifts Upload File

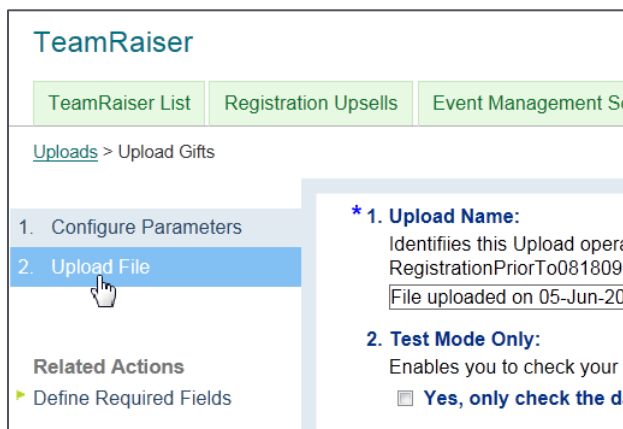
1. From an Administrator page, click **Fundraising > TeamRaiser**.
2. From the **TeamRaisers List** page, click **Uploads** from the tabs along the top.



3. On the **Uploads** page, click **Upload Gifts**.



4. On the **Configure Parameters** page, click **Upload File**.



5. On the **Upload File** page, click **SampleGiftUpload.csv** to open the file.

TeamRaiser

TeamRaiser List Registration Upsells Event Management Settings **Uploads** Participant Centers

[Uploads](#) > TeamRaiser Upload

1. Configure Parameters

2. Upload File

1. Sample TeamRaiser Gifts Upload File:
Provides a csv file for you to open and use as a model for your Upload file
[SampleGiftUpload.csv](#)

*** 2. TeamRaiser Gifts File to Upload:**
Locates and identifies the file containing the gifts to be uploaded

 Preview the file you have selected.

or [Cancel](#)

6. Make modifications to the sample file to fit your organization and save it as csv file.

UkSampleGiftUpload [Read-Only] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K
1	FR_ID	EVENT_NA	GIFT_AMC	GIFT_DAT	GIFT_CON	GIFT_AID	GIFT_ANC	PAYMENT	CHEQUE_I	BATCH_ID	RECEIPT_I
2	1000	TeamRaise	10	21/1/2006	FALSE	TRUE	TRUE	cash		batch1	
3		TeamRaise	20					cheque	123		

Defining Fields Required for the Upload

1. From **Related Actions** on the **Upload Gifts** page, click **Define Required Fields**.

✔ To display the **Upload Gifts** page, click **Fundraising > TeamRaiser > Uploads (tab) > Upload Gifts**.

2. On the **Define Required Fields** page, click the appropriate checkboxes of fields that must be in the upload file and must contain a non-null value. (Note the addition of the Gift Aid checkbox for UK TeamRaiser uploads.)

TeamRaiser

TeamRaiser List | Registration Upsells | Event Management Settings | **Uploads** | Participant Centers

Uploads > Upload Gifts > Define Required Fields

1. Configure Parameters

a. Define Required Upload Fields

2. Upload File

1. Required Fields for this Upload:
Selects the fields that must be entered and contain data in the csv file

☐ BATCH_ID
☐ CHECK_NUMBER
☐ DONO
☒ GIFT_AID
☒ GIFT_AMOUNT
☐ GIFT_ANONYMOUS
☐ DONOR_CONS_ID

3. Click **Finish**.

Naming and Uploading the File

1. On the **Configure Parameters** page, enter information and click the appropriate checkboxes, and then click **Next**.
(Tip: Replace the **Upload Name** default with a label that will help identify this as a **Gift Upload** for a TeamRaiser event.)

✔ To display the **Configure Parameters** page, click **Fundraising > TeamRaiser > Uploads (tab) > Upload Gifts**.

2. On the **Upload File** page, click **Browse** and locate the file (on your computer or shared network resource).

TeamRaiser

TeamRaiser List | Registration Upsells | Event Management Settings | **Uploads** | Participant Centers

Uploads > TeamRaiser Upload

1. Configure Parameters

2. Upload File

1. Sample TeamRaiser Gifts Upload File:
Provides a csv file for you to open and use as a model for your Upload file
[SampleGiftUpload.csv](#)

*** 2. TeamRaiser Gifts File to Upload:**
Locates and identifies the file containing the gifts to be uploaded

Browse

Preview Preview the file you have selected

Finish or [Cancel](#)

- To be sure you have selected the correct file, click **Preview** to view the first few lines of the selected file.
- If the file is correct, click **Finish**.

TeamRaiser

TeamRaiser List

Registration Upsells

Event Management Settings

Uploads

Participant Centers

Uploads > TeamRaiser Upload

1. Configure Parameters

2. Upload File

1. Sample TeamRaiser Gifts Upload File:
Provides a csv file for you to open and use as a model for your Upload file
[SampleGiftUpload.csv](#)

*** 2. TeamRaiser Gifts File to Upload:**
Locates and identifies the file containing the gifts to be uploaded

 Preview the file you have selected.

3. File Preview:
Here are the first few records of the file you selected.

FR_ID	EVENT_NAME	GIFT_AMOUNT	GIFT_DATE	GIFT_CONFIRMED	GIFT_ANONYMOUS
	RunForYourLife	\$50.00	1/12/2009	TRUE	FALSE
	RunForYourLife	\$75.00	1/12/2009	TRUE	FALSE
	RunForYourLife	\$100.00	1/12/2009	TRUE	FALSE
	RunForYourLife	\$100.00	1/12/2009	TRUE	FALSE
	RunForYourLife	\$150.00	1/12/2009	TRUE	FALSE

or [Cancel](#)

You can return to the **Uploads List** page to determine when the file has completed, its success, and so on. For more complete information, refer to the existing online help about Managing TeamRaiser Gift Uploads topic.

TeamRaiser

TeamRaiser List

Registration Upsells

Event Management Settings

Uploads

Participant Centers

Uploads

Related Actions

- Upload Registrations
- Upload Survey Responses
- Upload Gifts
- Upload List for Emailing
- Upload DSP Charges
- Upload Milestones
- View Error Codes

✓ The Upload is in progress

Refresh this page

This is a list of the TeamRaiser Upload operations performed on this site. To determine the number records created or updated by an Upload, use its Review action. If the Upload contains errors, use its Download Errors action to open a copy of the upload file and scroll to the end of each line to view the error that occurred.

- Upload List -

Records 1 - 3 of 3 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

Name	Actions	Status	Type	Upload Date	Message
RFYL_Gifts_ReceivedByJune	Review View Report	Uploading	Gift	05-Jun-2012 19:29:47	

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PAGE 21 of 41

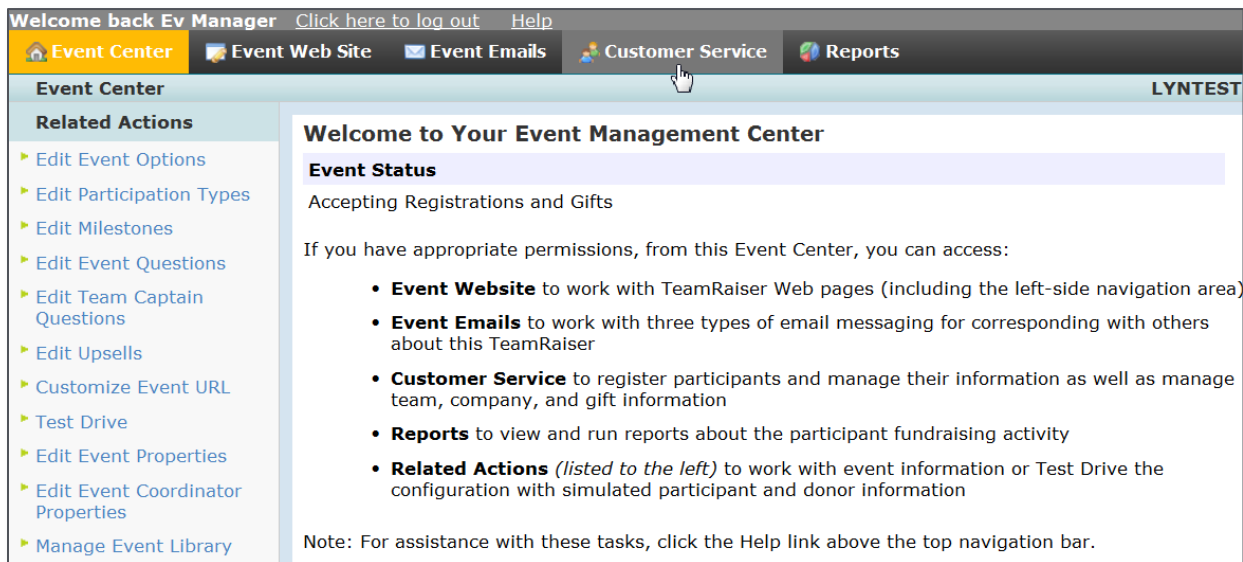
Uploading a Gift File in the Event Management Center Interface

The upload file must be prepared in advance in the comma-separated values (csv) format for upload. From the Uploads page, you can:

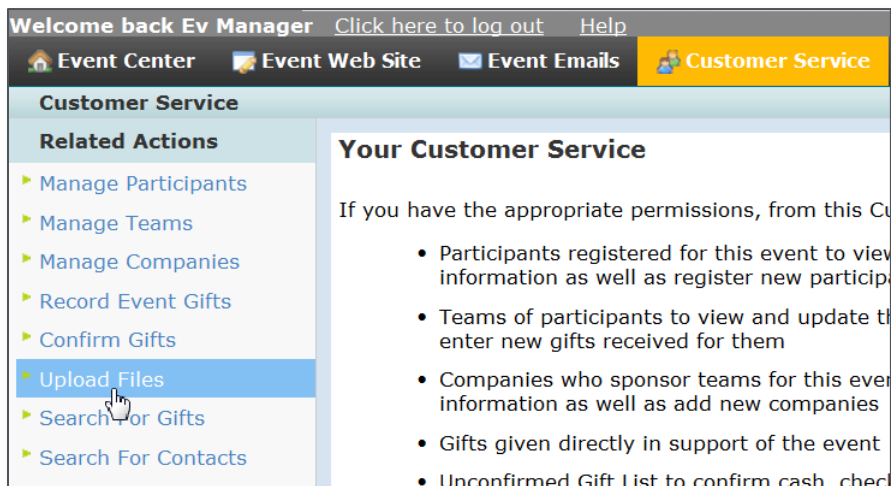
- [Create the file](#) using a sample .csv gift upload file
- [Name and upload the file](#) to send the file to the Upload queue for processing

Creating a File Using the Sample CSV Gifts Upload File

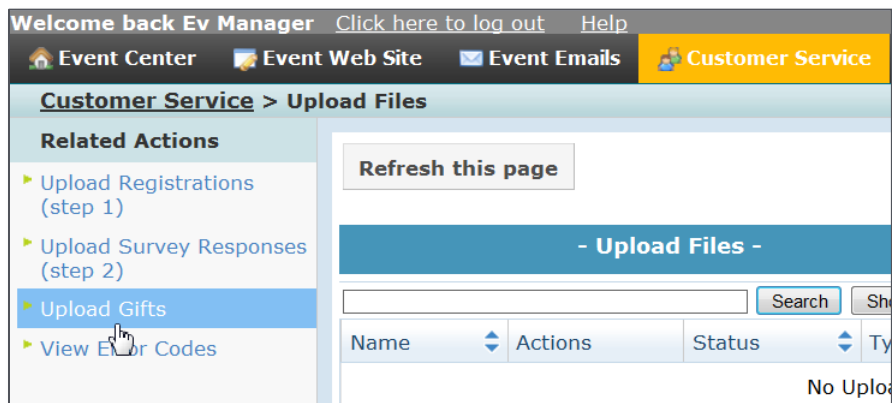
1. After logging into the Event Management Center, click the **Customer Service** tab from along the top.



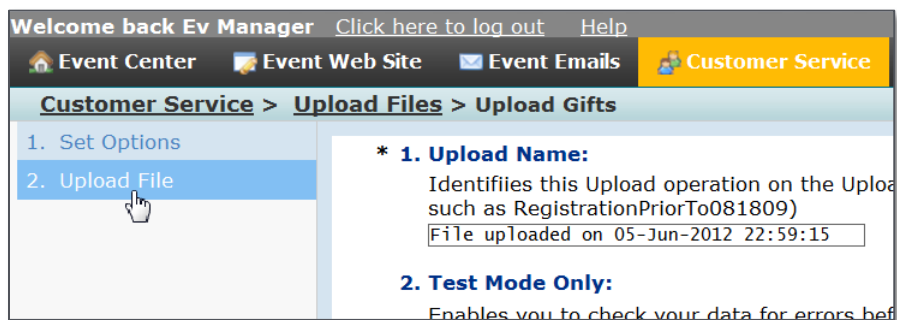
2. From the **Related Actions**, click **Upload Files**.



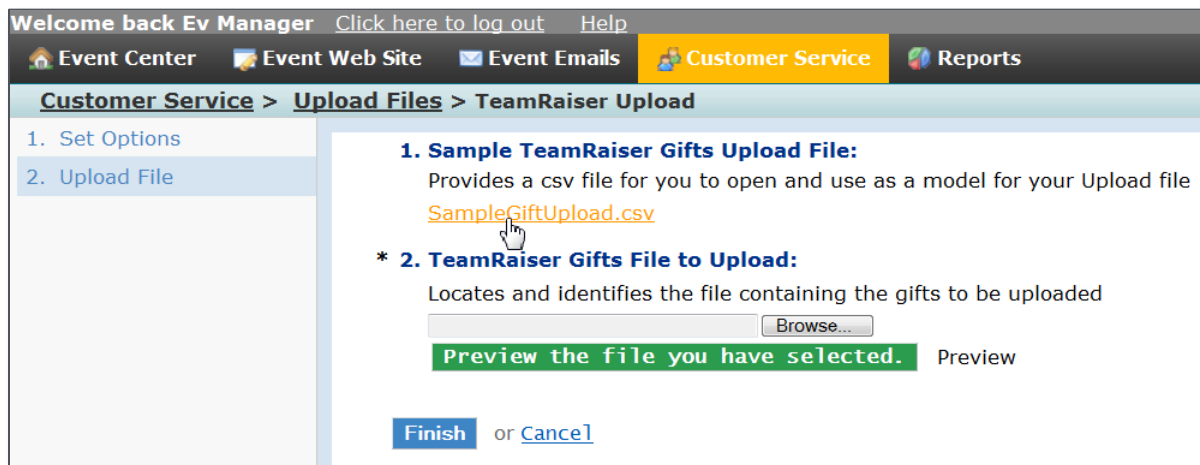
3. From the **Related Actions** on the **Upload Files** page, click **Upload Gifts**.



4. On the **Set Options** page, click **Upload File**.



5. On the **Upload File** page, click **SampleGiftUpload.csv** to open the file.



- Make modifications to the sample file to fit your organization and save it as csv file.

	A	B	C	D	E	F	G	H	I	J	K
1	FR_ID	EVENT_NAME	GIFT_AMC	GIFT_DATE	GIFT_CON	GIFT_AID	GIFT_ANC	PAYMENT	CHEQUE_ID	BATCH_ID	RECEIPT_ID
2	1000	TeamRaise	10	21/1/2006	FALSE	TRUE	TRUE	cash		batch1	
3		TeamRaise	20					cheque	123		

Naming and Uploading the File

- On the **Set Options** page, enter information and click the appropriate checkboxes, and then click **Next**.
(Tip: Replace the **Upload Name** default with a label that will help identify this as a **Gift Upload** for a TeamRaiser event.)

To display the **Set Options** page, click **Customer Service > Upload Files > Upload Gifts**.

- On the **Upload File** page, click **Browse** and locate the file (on your computer or shared network resource).

Welcome back Ev Manager [Click here to log out](#) [Help](#)

[Event Center](#) [Event Web Site](#) [Event Emails](#) **Customer Service** [Reports](#)

Customer Service > Upload Files > TeamRaiser Upload

1. Set Options
2. Upload File

1. Sample TeamRaiser Gifts Upload File:
Provides a csv file for you to open and use as a model for your Upload file
[SampleGiftUpload.csv](#)

*** 2. TeamRaiser Gifts File to Upload:**
Locates and identifies the file containing the gifts to be uploaded
 [Browse...](#)

Preview the file you have selected. [Preview](#)

[Finish](#) or [Cancel](#)

3. To be sure you have selected the correct file, click **Preview** to view the first few lines of the selected file.
4. If the file is correct, click **Finish**.

Welcome back Ev Manager [Click here to log out](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports

Customer Service > Upload Files > TeamRaiser Upload

1. Set Options

2. Upload File

1. Sample TeamRaiser Gifts Upload File:
Provides a csv file for you to open and use as a model for your Upload file
[SampleGiftUpload.csv](#)

*** 2. TeamRaiser Gifts File to Upload:**
Locates and identifies the file containing the gifts to be uploaded

Preview the file you have selected.

3. File Preview:
Here are the first few records of the file you selected.

FR_ID	EVENT_NAME	GIFT_AMOUNT	GIFT_DATE	GIFT_CONFIRM
	RunForYourLife	\$50.00	1/12/2009	TRUE
	RunForYourLife	\$75.00	1/12/2009	TRUE
	RunForYourLife	\$100.00	1/12/2009	TRUE
	RunForYourLife	\$100.00	1/12/2009	TRUE
	RunForYourLife	\$150.00	1/12/2009	TRUE

or [Cancel](#)

You can return to the **Uploads List** page to determine when the file has completed, its success, and so on. For more complete information, refer to the existing online help about uploading TeamRaiser gifts topic.

Welcome back Ev Manager [Click here to log out](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports

Customer Service > Upload Files

Related Actions

- Upload Registrations (step 1)
- Upload Survey Responses (step 2)
- Upload Gifts
- View Error Codes

✓ **Your upload is in progress. Please wait a minute before using the Refresh link.**

- Upload Files -

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

Name	Actions	Status	Type	Upload Date	Message
RFYLGiftUpload_June	Review View Report	Uploading	Gift	05-Jun-2012 23:02:57	

Entering Offline Donations for TeamRaiser Events in the Administrator Interface

Site and Event Administrators with the appropriate permissions can enter donations they receive in support of a:

- [Participant](#)
- [Team](#)
- [Event itself](#)

To perform the procedures below, you must have a TeamRaiser created with the [Gift Aid advanced option enabled](#) (refer to page 1).

Entering an Offline Donation Received in Support of a TeamRaiser Participant

1. From an Administrator page, click **Fundraising > TeamRaiser**.
2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.

The screenshot shows the 'TeamRaiser' section of the administrator interface. At the top, there are tabs for 'TeamRaiser List', 'Cross-Event Teams', 'Registration Upsells', and 'Event Mana'. Below the tabs, there are two buttons: 'Create a TeamRaiser' and 'Create Many TeamRaisers'. A text block explains the list: 'This is the list of TeamRaiser events created for your site. Use the Edit act... Use the Manage action to work with participants, teams, companies, gifts, have various roles within the event. Use the Archive action to remove a Te... archived TeamRaisers in the list again. To create a new TeamRaiser, click...'. Below this is a 'TeamRaisers' header. A pagination bar shows 'Records 1 - 6 of 6' with links for 'First', 'Previous', 'Next', and 'Last'. There is a search bar with 'Search' and 'Show All' buttons. A table lists the TeamRaisers with columns for 'TeamRaiser Name', 'Action', and 'Status'. The first entry is 'Run For Your Life 2012' with ID 1010. The 'Action' column for this entry contains links for 'Edit', 'Copy', and 'Manage' (which is highlighted by a mouse cursor). The 'Status' column shows 'Accepting Registrat' and dates for 'Published Date: June' and 'Unpublished Date: N'.



TeamRaiser Name	Action	Status
Run For Your Life 2012 ID: 1010	Edit Copy Manage	Accepting Registrat Published Date: June Unpublished Date: N

3. **Search** for the participant and click their name link from the search results displayed in the **Participants** List.

TeamRaiser Administration

[TeamRaiser List](#)
[Participants](#)
[Teams](#)
[Unconfirmed Gifts](#)
[Event](#)

Run For Your Life 2012

 [Register a Participant](#)
 [Manage Unconfirmed Gifts](#)

Participant Search

First Name:
Last Name:
Constituent ID:
Employer:
Postcode:
Team Name:
Registration Status:

☒ All
☐ Active
☐ Inactive

[Search This TeamRaiser](#)
[Search Across all TeamRaisers](#)

Participant List

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Name	Email	Team Name
Brown, Pat ID: 106007	Imaloney+pb@convio.com	

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)


[Done](#)

4. In the **Gift History** on the Registration page of the participant, click **Enter Offline Gift**.

TeamRaiser Administration

TeamRaiser List | Participants | **Profile** | Teams | Unconfirmed Gifts | Event Gifts | Coaching Emails | Event Managers | Lib

LYNTEST

 [Register a Participant](#) Find Participant: [Go](#)

[Set Batch ID](#)

Registration Information

Pat Brown Imaloney+pb@convio.com Edit Constituent Info Constituent ID: 1001007 User Name: Imaloney+pb@convio.com Participation Type: 10K Runner Registration Type: Offline Previous Participant: N/A Team Name: Register as individual participant without a team association Change team membership Edit registration information Refund	Status: Active Make Inactive Fundraising Goal: £0.00 Total Reported: £35.00 Total Confirmed: £35.00 Personal Page: View Edit Public / Default Make Private Team Page: Company Page:
---	--

Gift History [Enter Offline Gift](#)

Show Gifts: [Filter](#) [First](#) | [Previous](#) | [Next](#) | [Last](#)

5. On the **Choose Donor** page:
- Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Manage TeamRaisers

TeamRaiser List **Participants** Teams Unconfirmed Gifts Event Gifts Coaching Emails Event Managers Library

LYNTEST > Pat Brown

1. Choose Donor
2. **Configure Gift**

*** 1. Gift Amount:**
Defines the monetary amount of the single payment or of each payment to be collected for this gift
£10.00

2. Gift Aid:
The donor is a UK taxpayer, and this donation qualifies for Gift Aid.
☐ **Yes, this gift is eligible for Gift Aid**

3. Do Not Display Amount:
Determines if the amount of a gift will not be displayed (the donor name may still be visible)
☐ **Yes, do not display the gift amount**



Entering an Offline Donation Received in Support of a TeamRaiser Team

1. From an Administrator page, click **Fundraising > TeamRaiser**.
2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.
3. Click the **Teams** tab (at the top of the page).

TeamRaiser Administration

TeamRaiser List **Participants** **Teams** Unconfirmed Gifts Event

test

 [Register a Participant](#)  [Manage Unconfirmed Gifts](#)

4. From the **Teams** list, click **Manage** from the **Actions** column of the appropriate team.

Manage TeamRaisers

TeamRaiser List **Participants** **Teams** Unconfirmed Gifts Event Gifts Coaching Emails Event Managers Lib

test

This is a list of teams that have been formed for this TeamRaiser. Use the Manage action to view information about the team and its members or record a donation to the team.

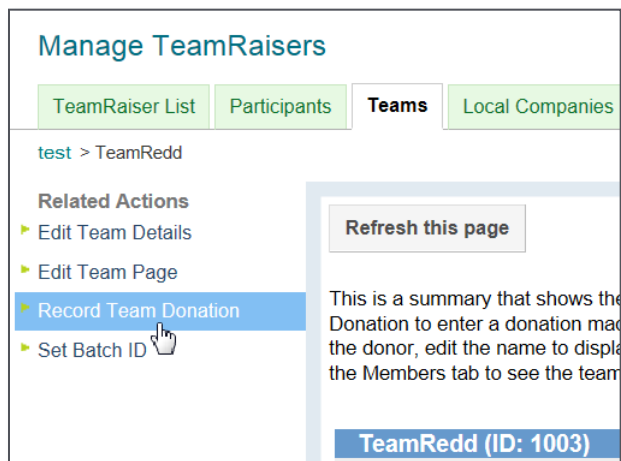
Teams

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

[Search](#) [Show All](#) Page 1 of 1 [To Page](#)

Name	Action	Team Captain	Company	Team Goal
TeamRedd ID: 1003	Manage Display Team Select New Captain	Sam Redd devnull+sr@convio.com		£0.00

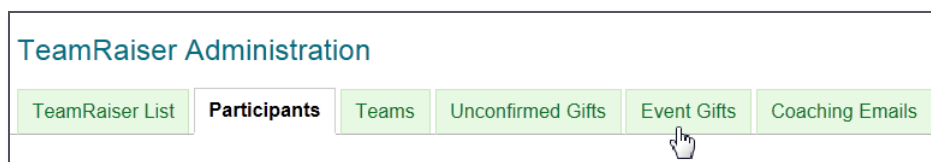
5. From the **Related Actions**, click **Record Team Gift**.



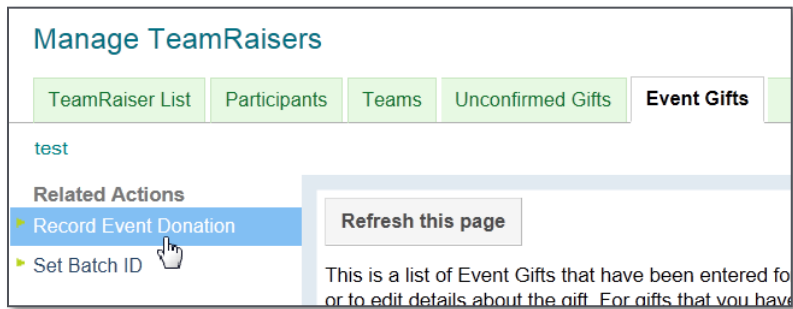
6. On the **Choose Donor** page:
 - Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.
7. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Donation Received for the TeamRaiser Event

1. From an Administrator page, click **Fundraising > TeamRaiser**.
2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.
3. Click the **Event Gifts** tab from the top of the **Participant Search** page.



4. From **Related Actions**, click **Record Event Donation**.



5. On the **Choose Donor** page:
- Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.
6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

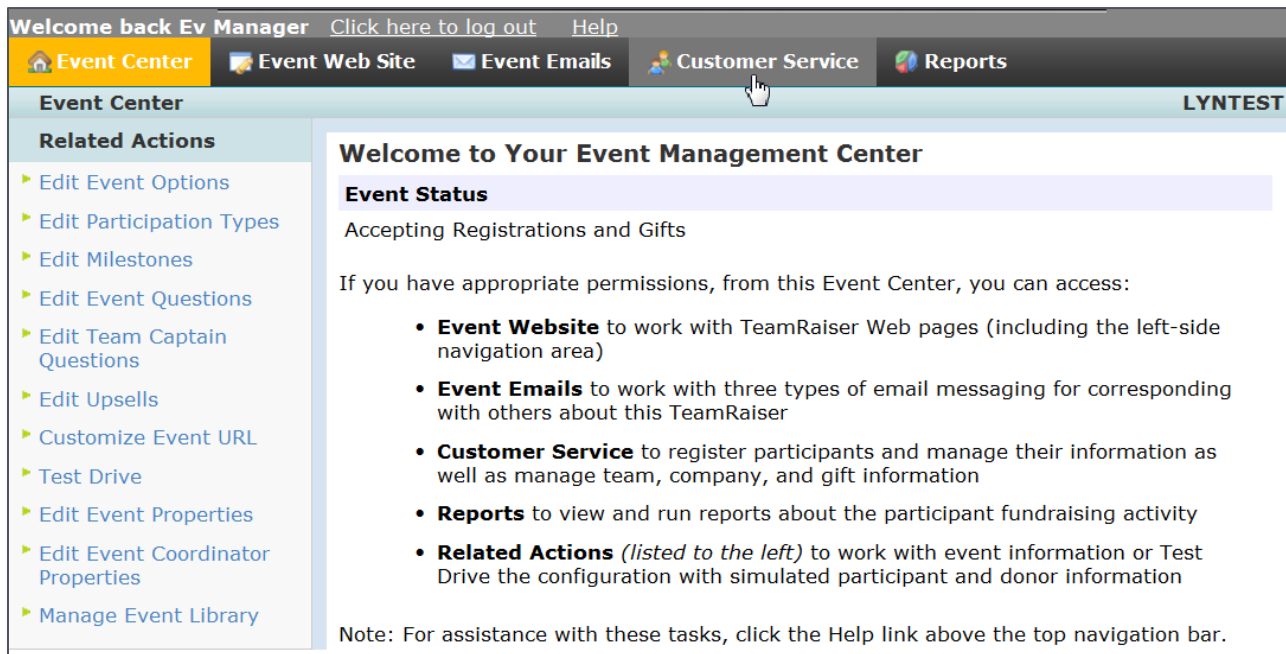
Entering Offline Donations for TeamRaiser Events in the Event Management Center

Event Managers with the appropriate permissions can enter donations they receive in support of a:

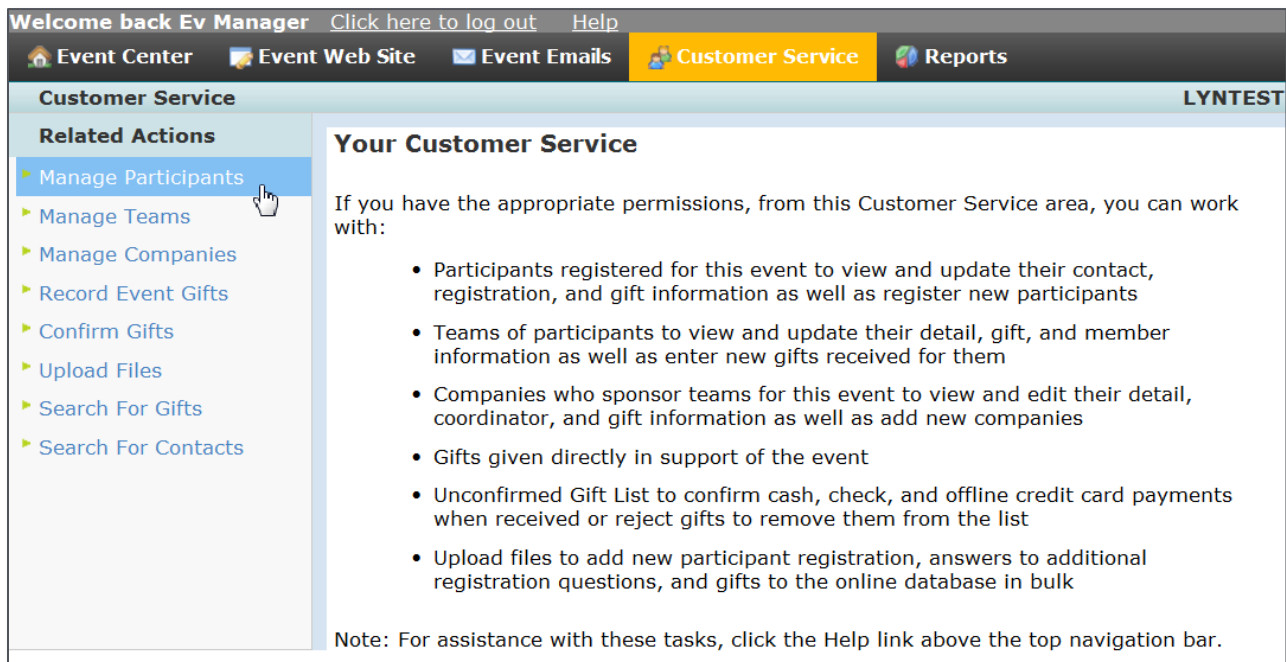
- [Participant](#)
- [Team](#)
- [Event itself](#)

Entering an Offline Donation Received in Support of a TeamRaiser Participant

1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.



2. From the **Related Actions**, click **Manage Participants**.



3. From the Participants list, click **Manage Participant** from the **Actions** column of the appropriate participant.

Welcome back Ev Manager [Click here to log out](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports

Customer Service > Manage Participants LYNTEST

[Search for Participants](#) [Register New Participant](#)

This is a list of participants registered for this TeamRaiser arranged in alphabetical order in pages of 20 records per page, and contains either all registered participants or only the participants returned from the last search performed.

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Name	Action	Email	TeamRaiser Name
Brown, Pat	Manage Participant	lmaloney+pb@convio.com	LYNTEST
Redd, Sam	Manage Participant	devnull+sr@convio.com	LYNTEST

4. From the **Related Actions**, click **Record new donation**.

Welcome back Ev Manager [Click here to log out](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports

Customer Service > Manage Participants > Manage Participant

Related Actions

- [Record Donation](#)
- [Edit Contact Information](#)
- [Edit Registration](#)

This is a summary that shows the contact, registration, and fundraising information for the selected participant and the information entered with this information.

Name: Pat Brown

5. On the **Choose Donor** page:
- Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.
6. On the **Configure Gift** page, enter and select the appropriate information and click **Process** (The **Gift Aid** step is new.)

Welcome back Ev Manager [Click here to log out](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports

Customer Service > Manage Participants > Manage Participant > Pat Brown

1. Enter Donor Information
2. Configure Gift

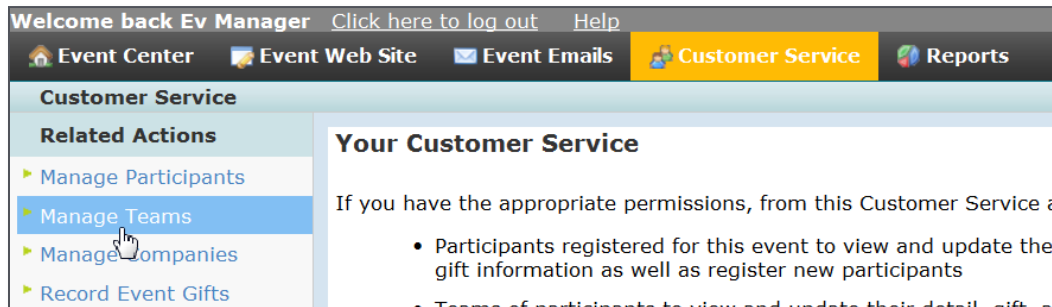
*** 1. Gift Amount:**
Defines the monetary amount of the single payment or of each payment to be collected for this gift

2. Gift Aid:
The donor is a UK taxpayer, and this donation qualifies for Gift Aid.
☐ **Yes, this gift is eligible for Gift Aid**

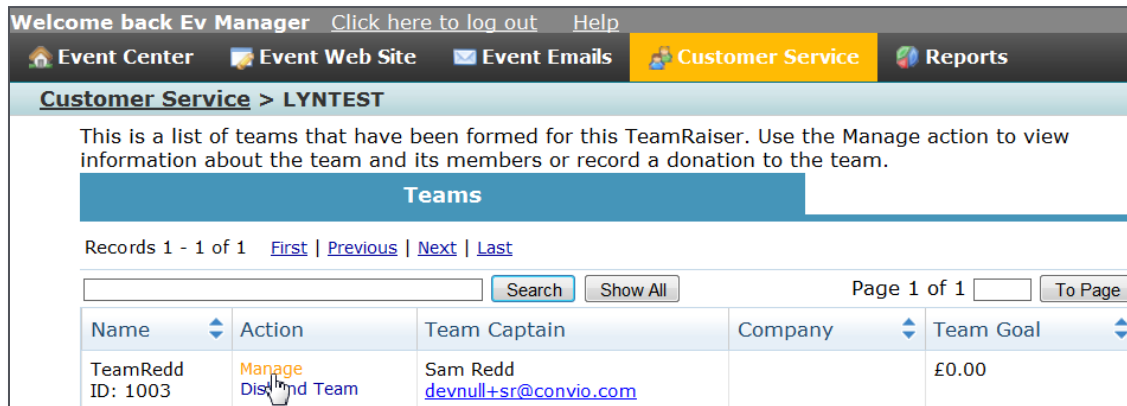
3. Do Not Display Amount:
Determines if the amount of a gift will not be displayed (the donor name may s

Entering an Offline Donation Received in Support of a TeamRaiser Team

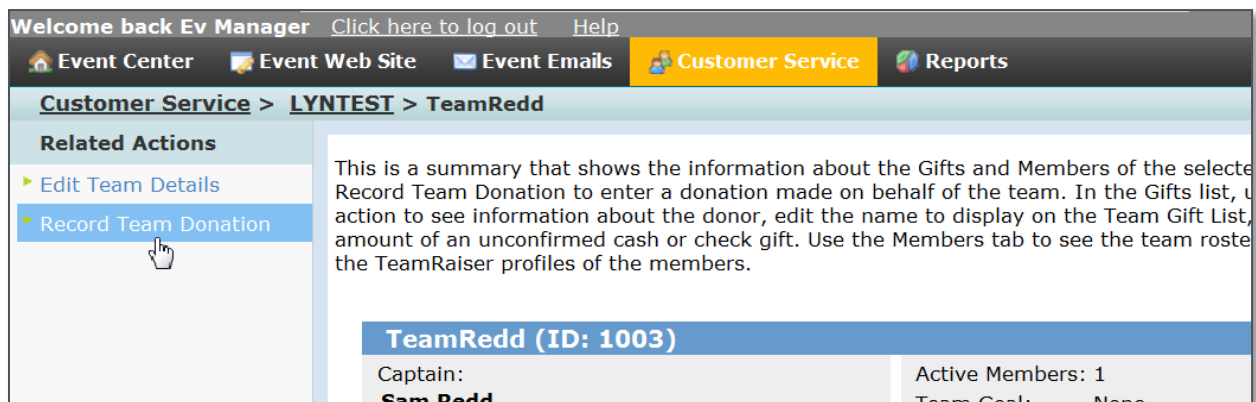
1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.
2. From the **Related Actions**, click **Manage Teams**.



3. From the **Teams** list, click **Manage** from the **Actions** column of the appropriate team.



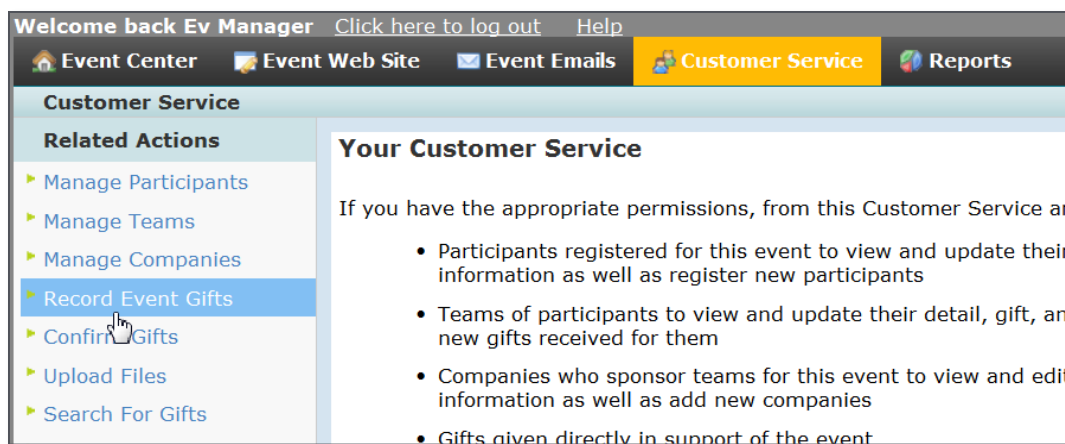
4. From the **Related Actions**, click **Record Team Donation**.



5. On the **Choose Donor** page:
 - Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.
6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Donation Received for the TeamRaiser Event

1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.
2. From the **Related Actions**, click **Record Event Gifts**.



3. On the **Choose Donor** page:
 - Click **New Donor** and enter the donor information and click **Create**.
 - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.
4. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Gift in the Participant Center

When allowed, participants who receive cash and cheques directly from donors can record them as Unconfirmed Gifts in their Participant Center.

1. After logging into their Participant Center, participant can click **Enter New Gift** on their **Home** page. (or, on their **Progress** page).

Welcome, Pat Brown | [Profile](#) | [Log Out](#)

HOME | **EMAIL** | **PROGRESS** | **PERSONAL PAGE**

Help | English (United Kingdom)

Overview

Your Fundraising Progress

£35.00 I HAVE RAISED | £0.00 MY GOAL [\(change\)](#) | 0% PERCENT | 1 DAYS LEFT

What to do next? [Customize your Personal Page with a story about why you are raising funds for this cause.](#)

Recent Activity

DONATION	Chris Smith donated £10.00 Cash	Jun 04
RECRUIT	You joined LYNTTEST	Jun 04
DONATION	You donated £25.00 Cash	Message sent Jun 04

[Send email](#)

[Enter new gift](#)

[Add Contacts](#)
[View Your Progress](#)
[Edit Personal Page](#)

2. Complete the information and click **Add**.

Welcome, Pat Brown | [Profile](#) | [Log Out](#)

HOME | **EMAIL** | **PROGRESS** | **PERSONAL PAGE**

[« Back to Progress](#)

Enter the details for a gift that someone gave you or promised to give you:

*First

*Last

Email

[Additional gift entry fields](#)

*Amount

Gift Aid The donor is a UK taxpayer, and this donation qualifies for Gift Aid.

☐ Yes, this gift is eligible for Gift Aid.

*Payment Type ☐ Cash ☐ Cheque

or or [cancel](#)

Viewing Gift Aid Amounts on TeamRaiser Status Indicators

Gift Aid amounts will display on the:

- **Campaign Progress** status indicator, which often displays on the Greeting page for the TeamRaiser event.

The screenshot shows a web interface for a TeamRaiser event. At the top is a navigation bar with links: Main Menu, My Account, TeamRaisers, Survey, and Stores. A language dropdown is set to 'English (en_GB)' with a UK flag icon. The main content area has a large heading 'Run For Your Life' on the left. To the right of the heading are several blue links: 'Click here to form a team', 'Click here to join an existing team', 'Click here to register as an individual', 'Click here to find a team or participant', 'Click here to donate directly', and 'Company List Page'. Below these links is a 'Campaign Progress' section with a light blue background. It displays 'Achieved: £588.00' and 'Gift Aid Match: £12.50' in a light purple box. Below this box is a purple link 'Make a gift!'. To the right of the text is a vertical thermometer-style progress bar with a red fill and a '100%+' label at the bottom.

Main Menu My Account TeamRaisers Survey Stores English (en_GB)

Run For Your Life

[Click here to form a team](#)
[Click here to join an existing team](#)
[Click here to register as an individual](#)
[Click here to find a team or participant](#)
[Click here to donate directly](#)
[Company List Page](#)

Campaign Progress

Achieved:
£588.00
Gift Aid Match:
£12.50

[Make a gift!](#)

100%+

- Team Status Indicator on the Team Page

TeamBrown - Join Team	Raised
★ Pat Brown	£113.00
1338577637	£12.00
1338577170	£13.00
1338577197	£13.00
1338577209	£13.00
Team Gifts	£40.00

★ Denotes a Team Captain

TeamBrown

Goal: £1,000.00
 Achieved: £204.00
 Gift Aid Match: £12.50

[Make a gift!](#)

20%

Reporting Considerations

In Report Writer, the **Gift Aid Status** checkbox has been added to several sections that can be configured in reports, including in the:

- Declined Transaction section

Declined Transaction				check all	uncheck
<input type="checkbox"/> Declined AVS Response	<input type="checkbox"/> Declined Account Number	<input type="checkbox"/> Declined Account Type	<input type="checkbox"/> Declined AVS Decode Value		
<input type="checkbox"/> Declined Bank Name	<input type="checkbox"/> Declined Bank Number	<input type="checkbox"/> Declined Billing City	<input type="checkbox"/> Declined Billing Email		
<input type="checkbox"/> Declined Billing First Name	<input type="checkbox"/> Declined Billing Last Name	<input type="checkbox"/> Declined Billing Middle Name	<input type="checkbox"/> Declined Billing Name		
<input type="checkbox"/> Declined Billing Phone	<input type="checkbox"/> Declined Billing State	<input type="checkbox"/> Declined Billing Street1	<input type="checkbox"/> Declined Billing Street2		
<input type="checkbox"/> Declined Billing Suffix	<input type="checkbox"/> Declined Billing Zip	<input type="checkbox"/> Declined Card Expiration Date	<input type="checkbox"/> Declined Card Number		
<input type="checkbox"/> Declined Check Number	<input type="checkbox"/> Declined Client IP	<input type="checkbox"/> Declined Confirmation Code	<input type="checkbox"/> Declined Contribution Creation Method		
<input type="checkbox"/> Declined Creation Date	<input type="checkbox"/> Declined Custom String1	<input type="checkbox"/> Declined Custom String2	<input type="checkbox"/> Declined Custom String3		
<input type="checkbox"/> Declined Custom String4	<input type="checkbox"/> Declined Discount Value	<input type="checkbox"/> Declined Donation Amount	<input type="checkbox"/> Declined Donation Date		
<input type="checkbox"/> Declined Donation Type	<input type="checkbox"/> Declined Employer	<input type="checkbox"/> Declined Gift Aid Status	<input type="checkbox"/> Declined INV Number		
<input type="checkbox"/> Declined Occupation	<input type="checkbox"/> Declined Original Value Transacted	<input type="checkbox"/> Declined Payment Installment	<input type="checkbox"/> Declined Processor Transaction ID		
<input type="checkbox"/> Declined Proxy ID	<input type="checkbox"/> Declined Proxy Type	<input type="checkbox"/> Declined Real Reference Number	<input type="checkbox"/> Declined Receipt ID		
<input type="checkbox"/> Declined Reference Number	<input type="checkbox"/> Declined Routing Number	<input type="checkbox"/> Declined Settlement Batch	<input type="checkbox"/> Declined Settlement Date		
<input type="checkbox"/> Declined Settlement Status	<input type="checkbox"/> Declined Transaction ID	<input type="checkbox"/> Declined Transit Number	<input type="checkbox"/> Declined User Confirmation Code		

- Deleted Transaction section

Deleted Transaction				check all
<input type="checkbox"/> Deleted AVS Response	<input type="checkbox"/> Deleted Account Number	<input type="checkbox"/> Deleted Account Type	<input type="checkbox"/> Deleted AVS Decode Value	
<input type="checkbox"/> Deleted Bank Name	<input type="checkbox"/> Deleted Bank Number	<input type="checkbox"/> Deleted Billing City	<input type="checkbox"/> Deleted Billing Email	
<input type="checkbox"/> Deleted Billing First Name	<input type="checkbox"/> Deleted Billing Last Name	<input type="checkbox"/> Deleted Billing Middle Name	<input type="checkbox"/> Deleted Billing Name	
<input type="checkbox"/> Deleted Billing Phone	<input type="checkbox"/> Deleted Billing State	<input type="checkbox"/> Deleted Billing Street1	<input type="checkbox"/> Deleted Billing Street2	
<input type="checkbox"/> Deleted Billing Suffix	<input type="checkbox"/> Deleted Billing Zip	<input type="checkbox"/> Deleted Card Expiration Date	<input type="checkbox"/> Deleted Card Number	
<input type="checkbox"/> Deleted Check Number	<input type="checkbox"/> Deleted Client IP	<input type="checkbox"/> Deleted Confirmation Code	<input type="checkbox"/> Deleted Contribution Creation Method	
<input type="checkbox"/> Deleted Creation Date	<input type="checkbox"/> Deleted Custom String1	<input type="checkbox"/> Deleted Custom String2	<input type="checkbox"/> Deleted Custom String3	
<input type="checkbox"/> Deleted Custom String4	<input type="checkbox"/> Deleted Discount Value	<input type="checkbox"/> Deleted Donation Amount	<input type="checkbox"/> Deleted Donation Date	
<input type="checkbox"/> Deleted Donation Type	<input type="checkbox"/> Deleted Employer	<input type="checkbox"/> Deleted Gift Aid Status	<input type="checkbox"/> Deleted INV Number	
<input type="checkbox"/> Deleted Occupation	<input type="checkbox"/> Deleted Original Value Transacted	<input type="checkbox"/> Deleted Payment Installment	<input type="checkbox"/> Deleted Processor Transaction ID	
<input type="checkbox"/> Deleted Proxy ID	<input type="checkbox"/> Deleted Proxy Type	<input type="checkbox"/> Deleted Real Reference Number	<input type="checkbox"/> Deleted Receipt ID	
<input type="checkbox"/> Deleted Reference Number	<input type="checkbox"/> Deleted Routing Number	<input type="checkbox"/> Deleted Settlement Batch	<input type="checkbox"/> Deleted Settlement Date	
<input type="checkbox"/> Deleted Settlement Status	<input type="checkbox"/> Deleted Transaction ID	<input type="checkbox"/> Deleted Transit Number	<input type="checkbox"/> Deleted User Confirmation	

- Pending Transaction section

Pending Transaction				check all
<input type="checkbox"/> Pending AVS Response	<input type="checkbox"/> Pending Account Number	<input type="checkbox"/> Pending Account Type	<input type="checkbox"/> Pending AVS Decode Value	
<input type="checkbox"/> Pending Bank Name	<input type="checkbox"/> Pending Bank Number	<input type="checkbox"/> Pending Billing City	<input type="checkbox"/> Pending Billing Email	
<input type="checkbox"/> Pending Billing First Name	<input type="checkbox"/> Pending Billing Last Name	<input type="checkbox"/> Pending Billing Middle Name	<input type="checkbox"/> Pending Billing Name	
<input type="checkbox"/> Pending Billing Phone	<input type="checkbox"/> Pending Billing State	<input type="checkbox"/> Pending Billing Street1	<input type="checkbox"/> Pending Billing Street2	
<input type="checkbox"/> Pending Billing Suffix	<input type="checkbox"/> Pending Billing Zip	<input type="checkbox"/> Pending Card Expiration Date	<input type="checkbox"/> Pending Card Number	
<input type="checkbox"/> Pending Check Number	<input type="checkbox"/> Pending Client IP	<input type="checkbox"/> Pending Confirmation Code	<input type="checkbox"/> Pending Contribution Creation Method	
<input type="checkbox"/> Pending Creation Date	<input type="checkbox"/> Pending Custom String1	<input type="checkbox"/> Pending Custom String2	<input type="checkbox"/> Pending Custom String3	
<input type="checkbox"/> Pending Custom String4	<input type="checkbox"/> Pending Discount Value	<input type="checkbox"/> Pending Donation Amount	<input type="checkbox"/> Pending Donation Date	
<input type="checkbox"/> Pending Donation Type	<input type="checkbox"/> Pending Employer	<input type="checkbox"/> Pending Gift Aid Status	<input type="checkbox"/> Pending INV Number	
<input type="checkbox"/> Pending Occupation	<input type="checkbox"/> Pending Original Value Transacted	<input type="checkbox"/> Pending Payment Installment	<input type="checkbox"/> Pending Processor Transaction ID	
<input type="checkbox"/> Pending Proxy ID	<input type="checkbox"/> Pending Proxy Type	<input type="checkbox"/> Pending Real Reference Number	<input type="checkbox"/> Pending Receipt ID	
<input type="checkbox"/> Pending Reference Number	<input type="checkbox"/> Pending Routing Number	<input type="checkbox"/> Pending Settlement Batch	<input type="checkbox"/> Pending Settlement Date	
<input type="checkbox"/> Pending Settlement Status	<input type="checkbox"/> Pending Transaction ID	<input type="checkbox"/> Pending Transit Number	<input type="checkbox"/> Pending User Confirmation	

- Refund Transaction section

Refund Transaction				check all
<input type="checkbox"/> Refund AVS Response	<input type="checkbox"/> Refund Account Number	<input type="checkbox"/> Refund Account Type	<input type="checkbox"/> Refund AVS Decode Value	
<input type="checkbox"/> Refund Bank Name	<input type="checkbox"/> Refund Bank Number	<input type="checkbox"/> Refund Billing City	<input type="checkbox"/> Refund Billing Email	
<input type="checkbox"/> Refund Billing First Name	<input type="checkbox"/> Refund Billing Last Name	<input type="checkbox"/> Refund Billing Middle Name	<input type="checkbox"/> Refund Billing Name	
<input type="checkbox"/> Refund Billing Phone	<input type="checkbox"/> Refund Billing State	<input type="checkbox"/> Refund Billing Street1	<input type="checkbox"/> Refund Billing Street2	
<input type="checkbox"/> Refund Billing Suffix	<input type="checkbox"/> Refund Billing Zip	<input type="checkbox"/> Refund Card Expiration Date	<input type="checkbox"/> Refund Card Number	
<input type="checkbox"/> Refund Check Number	<input type="checkbox"/> Refund Client IP	<input type="checkbox"/> Refund Confirmation Code	<input type="checkbox"/> Refund Contribution Creation Method	
<input type="checkbox"/> Refund Creation Date	<input type="checkbox"/> Refund Custom String1	<input type="checkbox"/> Refund Custom String2	<input type="checkbox"/> Refund Custom String3	
<input type="checkbox"/> Refund Custom String4	<input type="checkbox"/> Refund Discount Value	<input type="checkbox"/> Refund Donation Amount	<input type="checkbox"/> Refund Donation Date	
<input type="checkbox"/> Refund Donation Type	<input type="checkbox"/> Refund Employer	<input type="checkbox"/> Refund Gift Aid Status	<input type="checkbox"/> Refund INV Number	
<input type="checkbox"/> Refund Occupation	<input type="checkbox"/> Refund Original Value Transacted	<input type="checkbox"/> Refund Payment Installment	<input type="checkbox"/> Refund Processor Transaction ID	
<input type="checkbox"/> Refund Proxy ID	<input type="checkbox"/> Refund Proxy Type	<input type="checkbox"/> Refund Real Reference Number	<input type="checkbox"/> Refund Receipt ID	
<input type="checkbox"/> Refund Reference Number	<input type="checkbox"/> Refund Routing Number	<input type="checkbox"/> Refund Settlement Batch	<input type="checkbox"/> Refund Settlement Date	
<input type="checkbox"/> Refund Settlement Status	<input type="checkbox"/> Refund Transaction ID	<input type="checkbox"/> Refund Transit Number	<input type="checkbox"/> Refund User Confirmation	

- Valued Transaction section

Valued Transaction				check all
<input type="checkbox"/> Account Number	<input type="checkbox"/> Account Type	<input type="checkbox"/> AVS Decode Value	<input type="checkbox"/> AVS Response	
<input type="checkbox"/> Bank Name	<input type="checkbox"/> Bank Number	<input type="checkbox"/> Billing Address1	<input type="checkbox"/> Billing Address2	
<input type="checkbox"/> Billing Email	<input type="checkbox"/> Billing First Name	<input type="checkbox"/> Billing Last Name	<input type="checkbox"/> Billing Middle Name	
<input type="checkbox"/> Billing Name	<input type="checkbox"/> Billing Phone	<input type="checkbox"/> Billing Postcode	<input type="checkbox"/> Billing State	
<input type="checkbox"/> Billing Suffix	<input type="checkbox"/> Billing Town	<input type="checkbox"/> Card Expiration Date	<input type="checkbox"/> Card Number	
<input type="checkbox"/> Check Number	<input type="checkbox"/> Client IP	<input type="checkbox"/> Confirmation Code	<input type="checkbox"/> Creation Date	
<input type="checkbox"/> Creation Method	<input type="checkbox"/> Discount Value	<input type="checkbox"/> Employer	<input type="checkbox"/> Gift Aid Status	
<input type="checkbox"/> INV Number	<input type="checkbox"/> Occupation	<input type="checkbox"/> Original Value Transacted	<input type="checkbox"/> Payment Installment	
<input type="checkbox"/> Processor Transaction ID	<input type="checkbox"/> Proxy ID	<input type="checkbox"/> Proxy Type	<input type="checkbox"/> Real Reference Number	
<input type="checkbox"/> Receipt ID	<input type="checkbox"/> Reference Number	<input type="checkbox"/> Routing Number	<input type="checkbox"/> Settlement Batch	
<input type="checkbox"/> Settlement Date	<input type="checkbox"/> Settlement Status	<input type="checkbox"/> Transaction Amount	<input type="checkbox"/> Transaction Custom String	
<input type="checkbox"/> Transaction Custom String2	<input type="checkbox"/> Transaction Custom String3	<input type="checkbox"/> Transaction Custom String4	<input type="checkbox"/> Transaction Date	
<input type="checkbox"/> Transaction ID	<input type="checkbox"/> Transaction Tax ID	<input type="checkbox"/> Transaction Type	<input type="checkbox"/> Transit Number	
<input type="checkbox"/> User Confirmation Code				

Reports containing these sections include

- Interactions > Interaction Details includes all 5 sections
- Transactions > Transactions Details includes Valued Transaction section
- TeamRaiser > Gift Details includes the Valued Transaction section

ADDITIONAL RESOURCES

We understand that our solutions are an integral part of your organization's success, and so we offers several ways for you to get the help and information you need:

Learn More »

[Summer 2012 Release](#) – The community is a one-stop-shop containing everything you need to know about the release, including an overview of all the new functionality, summaries of other features, and links to release-specific training and help resources.

Get Support »

[Support](#) – Our Client Care team strives to provide you with the best possible support experience by promptly responding to questions and resolving issues submitted via the method that's most convenient for you. In addition to contacting us via a case or phone, you also have the option to chat with us live to get a quick answer for your quick questions.

[Training](#) – We offer a diverse set of training options to meet a variety of roles, learning styles, and situations. Track your learning path and history, view upcoming classes, download documentation and best practices, and browse other resources – via a web browser, at no extra charge, no matter where you are.

Get Started »

[Release Calendar](#) – For Luminate Online products, review our Release Planning Calendar to determine when this update will be available to you. For Luminate CRM, please contact your Account Representative.

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