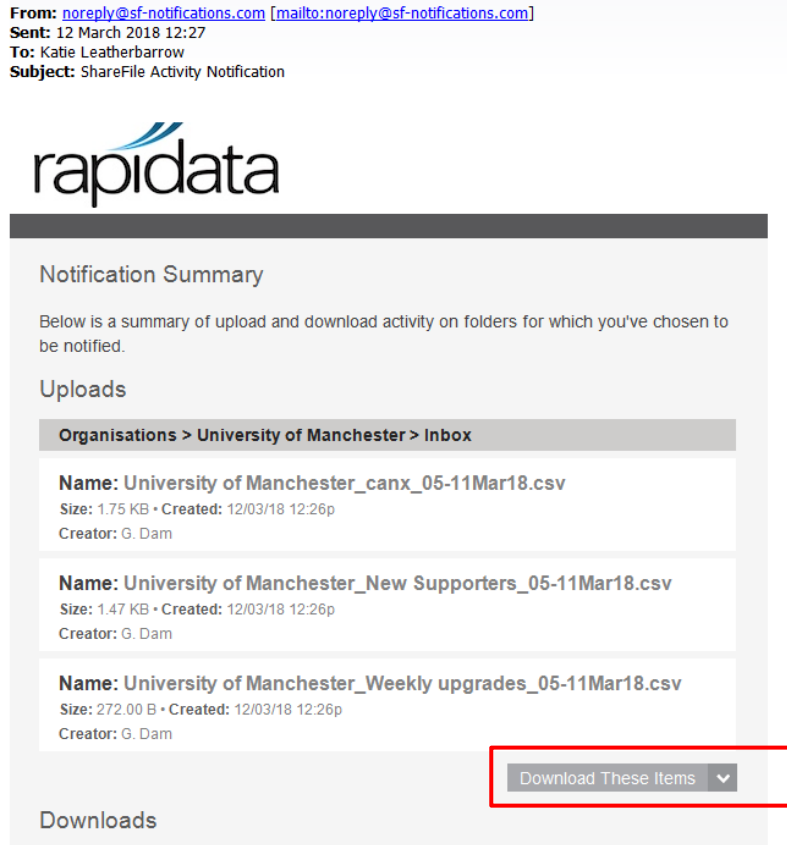
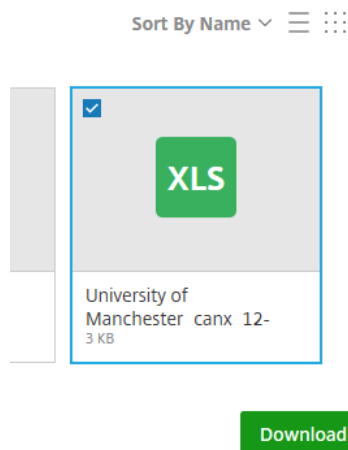


labelling="Section-Header">Cancelling Direct Debits (file from Rapidata)

1. You will receive an email from Rapidata detailing 3 files for download.
2. Click 'download these items'.



3. This will take you to rapidata. Select the University of Manchester canx file and click download. The spreadsheet shows those who have cancelled their direct debit in the past week/10 days.



4. Open the first constituent on the spreadsheet in RE. You can search on confirmation reference (column AI) which relates to constituent ID on RE. You can also search via postcode, etc.

- If the confirmation reference (column AI) starts with a U, do not use this to search on RE. Use other fields such as postcode, name, etc.
- Go into the 'gifts' tab and open up the recurring gift line in **bold pink** that relates to the direct debit.

Type	Gift subtype	Date	Campaign	Amount	Fund
Recurring Gift ...	Direct Debit	15/02/2018	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/01/2018	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/12/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/11/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/10/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/09/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/08/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/07/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/06/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/05/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/04/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/03/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/02/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/01/2017	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/12/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/11/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/10/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/09/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/08/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/07/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/06/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/05/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/04/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/03/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift ...	Direct Debit	15/02/2016	Annual Gift (YMF)	£3.00	Undergraduate Access Schol...
Recurring Gift	Direct Debit	03/12/2015	Annual Gift (YMF)	£3.00	Undergraduate Access S...

- Look what cancellation code is assigned and what this means on the document found here: <I:\Development Services\Gift Processing\Gift Processing Procedures\1Katie USER GUIDES\RDS Cancellation Codes 2015.pdf>
- Change the Status depending on the cancellation code. E.g, 'Terminated' (e.g F31) or 'completed' (e.g, C221).
- Change the date to the date the direct debit was cancelled which is found in column AX of the spreadsheet.

File Edit View Gift Favourites Tools Help

Save and Close

Transactions Amendments Split Gift

Gift Miscellaneous Soft Credit Matching Gifts Tribute Attributes Tag

Constituent: Rebecca ID: 123456

Gift type: Recurring Gift Reference: 123456

Gift subtype: Direct Debit Acknowledge: Acknowledged

Gift date: 03/12/2015 Letter: Benefits

Amount: £3.00 Schedule Receipt: Do Not Receipt

Campaign: Annual Gift (YMF) Receipt amt./no.: £3.00

Fund: Undergraduate Access Scholarsh

Appeal: AF 15/16 TFC Status/date: Terminated 08/03/2018

Package: TFC 16.01.09a

Canvassers: History

Pay method: Direct Debit EFT? Ref no./date:

Bank: DUMMY Details

Date added: 04/12/2015 Gross amount: £3.75

Press F7 for table lookup 13/03/2018