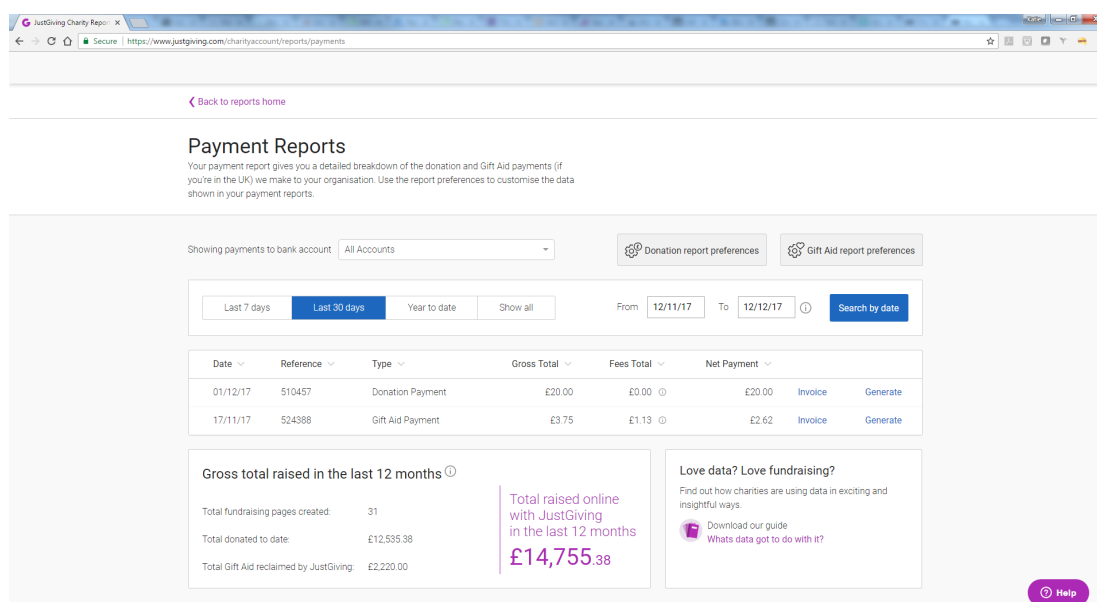


JustGiving

You will need access to/training in Importomatic + access to the RBS bank account + access/email alerts from JustGiving

Reports are usually generated every Wednesday – so put a diary reminder in. (JustGiving used to send email alerts but they no longer work for me...)

1. Log into JustGiving here: <https://www.justgiving.com/charityaccount/reports/payments> and generate the report you want (ones that haven't yet been downloaded are in a dark blue box):
 - a. There are 2 types of report – **Donation Payments** and **Gift Aid Payments** – there are separate IOM profiles for these.



2. Check the RBS bank account to see if the correct amount was paid to us (it might not be the whole amount – it depends on the fees JustGiving takes)
3. If you're in doubt about which report you're up to, use the query in Raiser's Edge called 'CHECK – JustGiving Gifts' – in it you can see the Payment Reference number stored in the Gift Attributes. So you can see which was the last report you imported.

CHECK - JustGiving Gifts - The Raiser's Edge

File Edit View Format Records Favourites Tools Help

1: Criteria 2: Output 3: Sort 4: Results

Why are there duplicates in my query results?

Constituent ID	Name	Gift Amount	Campaign Description	Fund Description	Appeal Description	Package Description	Gift Date	Gift Date Added	Gift Specific	Gift Payment Type	Gift Specific Attributes
DARO 6960		£15.00	Annual Gift (other)	Cancer Sciences (Institute)	Emma Byles Bursary Appeal		26/10/2017	13/12/2017		Credit Card	510457
DARO 02461	Anonymous Donations	£5.00	Annual Gift (other)	Whitworth Art Gallery	Cultural Assets		07/09/2017	13/12/2017		Other	510457

Donation Payment Report

4. Split out the **SMS payments** into a new csv
 - a. Copy the SMS data into a new csv and delete from the main report
 - b. If there is anything other than Museum or Whitworth Art Gallery, some data decisions will need to be made and info added to the IOM dictionaries
 - c. Import the SMS payments via IOM = profile '1 JustGiving Gifts SMS'
5. Import the donations CSV using profile 'JustGiving Gifts'. You need to match or add records should RE prompt you do to so (most of them will be 'Anonymous' which means that the donor has not opted in to hearing from us. These are matched to the Anonymous record on RE DARO 7987)
6. You will most likely get some exceptions, make sure these are saved on the drive and commit the import to load those records that have been successful.
7. **Adding new fundraiser ID's into the RE dictionary**
 - a. Open up your exceptions and sort by surname. These people need to have their fundraiser ID's added to ImportOmatic dictionaries corresponding to the data in RE.

The new ID's need to be added to the following dictionaries:

- JustGiving Appeals
- JustGiving Campaign
- JustGiving Funds
- JustGiving Package
- JustGiving Soft Credit

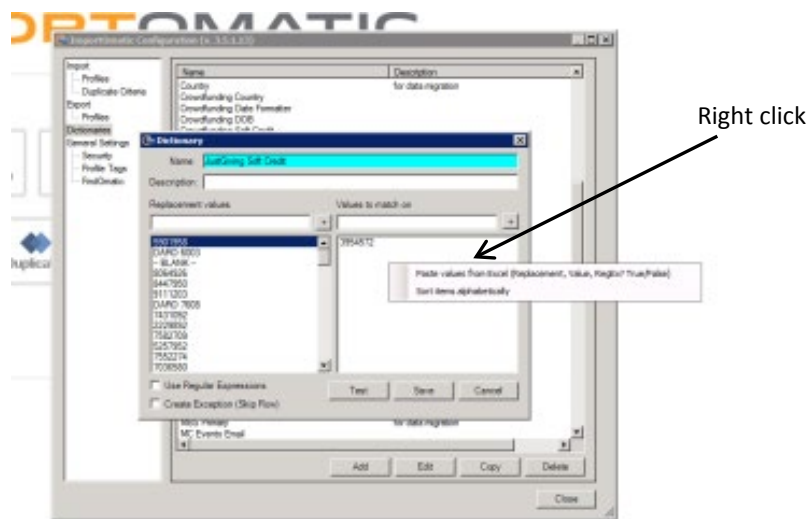
Constituent ID from Raiser's Edge = into the soft credit dictionary

Fundraiser ID from Justgiving spreadsheet = fund/appeal/package/campaign dictionaries

- b. Open up the dictionary spreadsheet [here](#). This is where the new ID's are recorded.
 - c. From the exceptions spreadsheet, copy the fundraiser ID's into the dictionary spreadsheet (only one for each person).
 - d. Find each person's constituent ID on RE and paste next to the fundraiser ID .
 - e. If the person is not an alum and not on RE, create a record.
- **JustGiving soft credit**
 - f. Go to the JustGiving soft credit dictionary (get to dictionaries by plug ins → importomatic → configuration)
 - g. Make sure the constituent ID is the column before the fundraiser ID in the dictionary spreadsheet (as below)

DARO 5771	65250044
DARO 7953	69740063
7081630	8545612
5187736	5817683
DARO 7900	46483174
7261977A	524381
9418333	69937408
DARO 7966	69822717
7462450	29551913
9085703	57866604
10079002	69920615
7227121	65630548
9890430	69972876

- h. Highlight these 2 columns of data, copy and paste into the soft credit dictionary. To paste, right click in the right column and 'paste values from excel'.



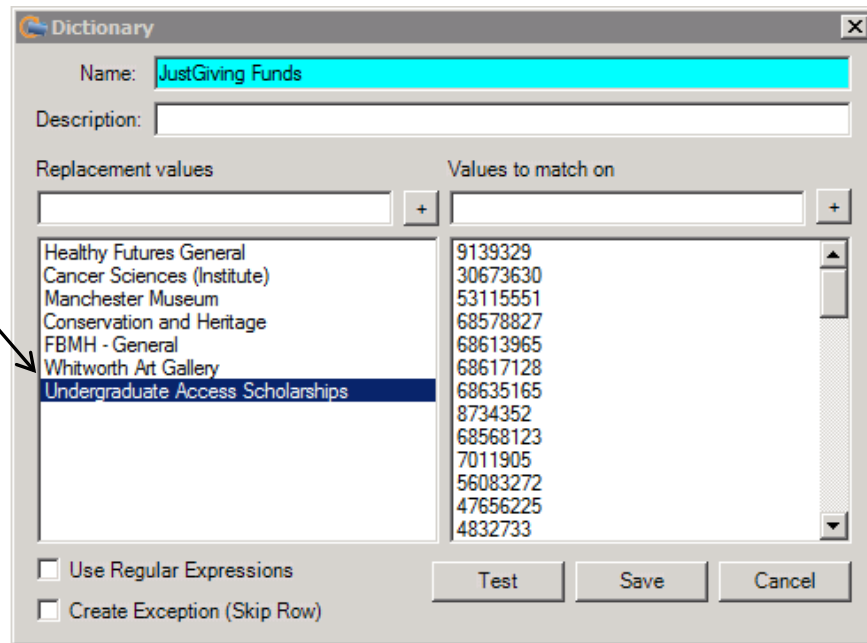
- i. If you scroll to the bottom in the left hand column the constituent ID's will be there and when you click on one, the corresponding fundraiser ID is in the right hand column.
 j. Save and close

- **JustGiving Appeal/Campaign/Fund/Package**

- a. For the other dictionaries you need to have the fund/package/campaign/appeal on the left hand side and fundraiser ID on the right hand side (match how the RE dictionary is set out)

Undergraduate Access Scholarships	65250044
Undergraduate Access Scholarships	69740063
Undergraduate Access Scholarships	8545612
Undergraduate Access Scholarships	5817683
Undergraduate Access Scholarships	46483174
Undergraduate Access Scholarships	524381
Undergraduate Access Scholarships	69937408
Undergraduate Access Scholarships	69822717
Undergraduate Access Scholarships	29551913
Undergraduate Access Scholarships	57866604
Undergraduate Access Scholarships	69920615
Undergraduate Access Scholarships	65630548
Undergraduate Access Scholarships	69972876

The fund is in the left column so fund has to be the left column of the excel data when pasting



- b. Copy and paste the excel data into the dictionary as before (right click and paste excel values).
 - c. Repeat the same process for each of the dictionaries, using the appropriate fund/appeal/campaign/package
8. Save the exceptions as a CSV, run through 'JustGiving Gifts' and commit the import
9. **Post Import Checking – New Records**
- a. Run the query CHECK – JustGiving Gifts
 - b. Those with no constituent ID need the following added to their record:
 - Title
 - Gender
 - Constituent ID: use sheet [here](#)
10. Tidy the dictionary spreadsheet
- Add the constituent's name and make sure all info is complete

Gift Aid Payment Report

- Generate the report in the same way from JustGiving – but no need to check and add the fundraiser IDs into the IOM dictionaries – as the gifts have already been processed, this is the subsequent gift aid payment.
- Run through IOM profile 'JustGiving Gift Aid'