### **INSTRUCTIONS for Using**

## Both the GiGi Fundraising Fitness Test & Growth in Giving Reports Excel Program Templates

Make sure you have Excel 2003 or newer.

#### STEPS TO PREPARE YOUR GIFT TRANSACTION FILE

Export your 3 Gift-Transaction Data fields (Donor Account Number, Date, and Amount of Gift) from your database into Excel. (see Export Tips below).

Open the Excel file which contains the Gift-Transaction data you just exported. **Delete the first row if HEADERS are present & delete last row TOTALS if present.** 

### **STEPS TO COPY DATA**

Press and hold the CTRL key, while also Pressing the END key to move cursorto the end of the data.

Place your cursor on the Last Gift Amount in Column C.

<u>Press and hold</u> the SHIFT key, <u>while also Pressing</u> the CTRL key <u>and</u> the HOME key to highlight all of your data.

Release all of the keys, then place your cursor within the highlighted area, **Click** the **RIGHT Mouse** button and then select **COPY**.

### **STEPS TO PASTE DATA**

Open the **GiGi FUNDRAISING FITNESS TEST** or the **Growth in Giving Reports Excel File** (**Click** on the **DATA** worksheet in bar at the bottom of window).

Place cursor in Cell A-2 & Click the RIGHT Mouse button & choose PASTE, to populate Columns A, B & C.

### **STEPS TO RUN REPORTS**

Click the **StepByStep** worksheet. Look for the **Security Warning** about macros above **Column A** and **Click** the **OPTIONS** or **ENABLE CONTENT** box (if a pop up box appears with several options, **Click ENABLE CONTENT** then **Click OK** so the macros can run).

The default setting for **Year2** is **2012** and **Year1** is **2011** (Year 1 is automatically calculated as one year ago). To compare other years you must change Year2.

**Click** the **RUN GIGI REPORTS** OR **RUN GIG REPORTS** button in **Cell G-16** to process all the reports in the template.

# STEPS TO VERIFY RESULTS BEFORE PRINTING REPORTS

In the **StepByStep** worksheet, **Cells H-1, 2 & 3** will show the start, end and elapsed time when the macros have finished processing.

In the **DATA** worksheet, **Column D** will automatically populate with the year the gift was received. Verify that **Cells G-2 & 3** match, and also that **Cells H-2 & 3** match. (If these numbers <u>do not</u> match, save the results and email <u>FEP@afpnet.org</u> for assistance. (also use this email address for help interpreting reports).

In the 6 RED worksheets, numbers in RED BOXES show continuity of your data across all reports.

## STEPS TO SAVE RESULTS AND PRINT REPORTS

Click the circular Microsoft Office button in the Upper LEFT corner of your screen and choose SAVE AS and Rename the file, then SAVE it.

Print the **6 RED** worksheet reports. (If you need help interpreting the reports, email FEP@afpnet.org).

### EXPORT TIPS

### What to Export:

All cash gifts & pledge payments (exclude unpaid pledges & in-kind gifts that are not converted to cash).

Include at least 6 years, but limit the number of gifts to 300,000 by exporting 8 years of history.

### Fields and Format for Export:

The Donor ID# (to link multiple gifts), Date & Amount of each gift.

XLS or XLSM are the most common formats, but CSV allows larger files to be emailed.

### IN THE EXPORTED FILE: Delete the first row if HEADERS are present & last row TOTALS if present.

# eTapestry Gift Transaction Data Export Steps:

- 1) For Data Return Type, select JOURNAL ENTRIES.
- 2) For Starting Criteria: for Category, select BASE, and for Query, select ALL Constituents.

3) For Criteria, under Available Fields, select COMMONLY USED FIELDS from the drop-down menu. Choose INDIVIDUAL TRANSACTION RECEIVED.

4) For Individual Transaction Received, set the parameters to GREATER THAN OR EQUAL TO \$1.00.

### **Raiser's Edge Gift Transaction Data Export Steps:**

- 1) Create a gift query with GIFT DATE OPERATOR" Greater Than or Equal to" and then specify the starting date
- 2) Use the "and" to choose cash as gift type, and specify GIFT AMOUNT greater than or equal to \$0.
- 3) On the output tab, select CONSTITUENT ID NUMBER, GIFT DATE and GIFT AMOUNT.
- 4) Run Query
- 5) Export to Excel (if file is too large, export as a CSV file)

If these steps do not work or you have another donor management software packages, call your support number.