CharitableGiving

we make giving easy

On-Line Charity Reporting: **User Guide**

You could make a world of difference

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On-Line Charity Reporting: User Guide

Welcome to Charitable Giving's Charity On-Line Reporting facility.

The facility is easy to use and designed to allow you to manage your report files, downloading as necessary as well as archiving and/or un-archiving/deleting files as required. Details of how to do this are set out in this User Guide. Good luck.

1. To access reports for your charity, first go to www.charitablegiving.co.uk and then:

Click on the User Login link

2. At the On-Line User Login screen:
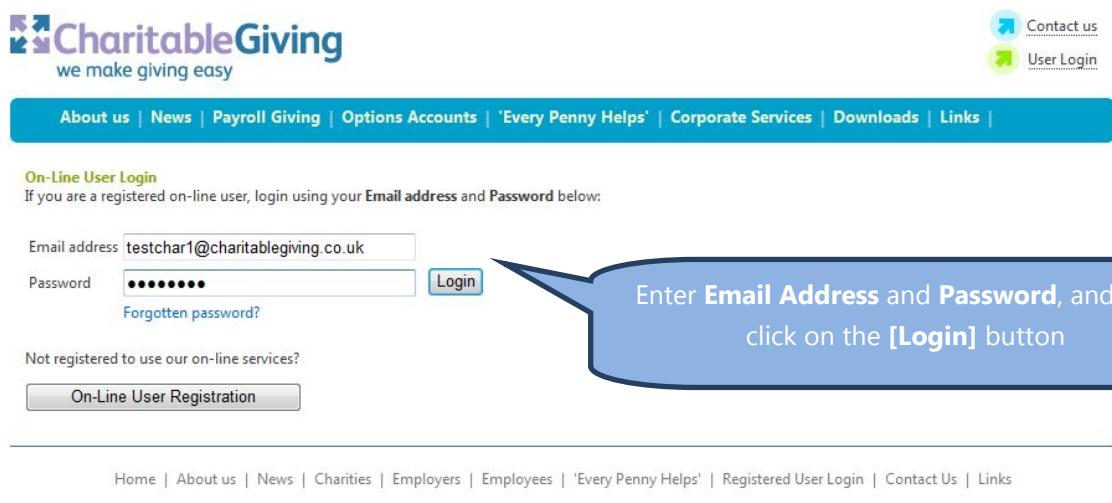
Enter **Email Address** and **Password**, and then click on the **[Login]** button

3. After your Email Address and Password have been validated:

Enter your **Charity Reference** and then press **[Submit]**

You will have received your Charity Reference(s) in the email confirming your registration and account activation

4. The **Current Reports** available for your charity will then be listed, the most recent first according to the format, YEAR_MONTH_CHARITY REFERENCE_CHARITY NAME, as shown below:

5. Files can be downloaded one at a time. To **Download** a file:

6. The **File Download** dialog will then be displayed, as shown below, and you can **Open** or **Save** the file as required
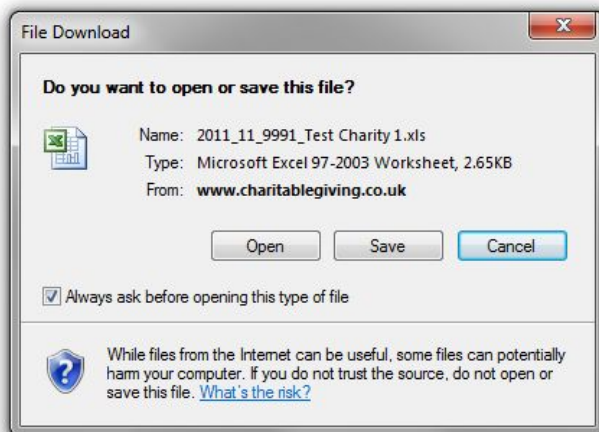
Other files can then be downloaded in the same way and downloaded files remain in the list of files under **Current Reports** until moved to **Archived Reports** or **Deleted.**

Please note, however, that to conserve space files older than 180 days will be deleted automatically; if you require a report that has been removed, please contact Charitable Giving and there may be an additional charge for this service.

7. To view any **Archived Reports**:

Open the list by clicking on the **Archived Reports** link

8. Any number of **Current Reports** can be archived as a batch by:

1. Selecting the file(s) by clicking the box to the left of the name(s)

2. Selecting **Archive** from the dropdown in the Action options window and then pressing **[GO]** button

Alternatively, files can be similarly deleted from the **Current Reports** list by selecting the **Delete** option instead.

9. In a similar manner, files can be moved from **Archived Reports** to **Current Reports** using the **Unarchive** option followed by [GO] having selected the required files as before:

10. It is worth noting that when using the **Archive, Delete,** and **Unarchive** functions, all files can be selected by:

Clicking in the box to the left of **Filename**

11. When you have finished your session, you can logout by:

Clicking on the Logout link

Additional copies of this User Guide can be obtained from:

www.charitablegiving.co.uk > Downloads > Literature