

We have updated the donor area on Fund Filer. This is to help users understand donor records and the information held much more easily and to assist with managing the records more efficiently. Information about a particular donor should be much more easily visible and manageable. The main changes are summarised below.

This update has involved significant 'under the hood' rework of the underlying code that drives this part of Fund Filer. Apart from the immediate changes, this will enable future revisions to be implemented more easily.

Revised 'Donors List'

Finding donors

The search criteria for finding donors has been extended to 'postcode' or 'reference' as well as last name.

Deleting donors

By popular request, donors with no donations recorded against them can now be deleted from the 'Donors List'. This is achieved via a green link to the far right of each donor record.

For reasons of compliance, and to avoid potential chaos, it is not possible to delete a donor once a donation has been recorded against that person. If the underlying donation records are incorrect but not yet claimed, these should be deleted to allow Fund Filer to remove the donor record.

We hope this will assist users with keeping tidy lists. Previously, archiving was the only option for clearing an unwanted donor record from the donor list.

New side panel

A green side panel now appears top right with options for creating new donors and transferring donor information to and from Microsoft Excel. There have always been links on this page for doing this, but we hope this will be more user-friendly.

The screenshot shows the 'Donors List' page in Fund Filer. At the top, there is a navigation menu with 'HOME', 'YOUR ACCOUNT', 'HELP & SUPPORT', 'ABOUT FUND FILER', and 'CONTACT US'. Below this is the 'Donors List' header with a search box and 'Search' and 'Show Archived' buttons. A table of donors is displayed with columns for Title, Name, Surname, Ref, Address, Postal, Town, Postcode, and Gift Aid declaration. Callouts highlight new features: a green side panel with 'Add New Donor', 'Export to Excel', and 'Import from Excel' buttons; a 'Delete' button next to each donor record; and a search box with 'Search' and 'Show Archived' buttons.

Title	Name	Surname	Ref	Address	Postal	Town	Postcode	Gift Aid declaration	Archive	Delete
Mr	Alan	Alderton	1	11 Avenue Road	Everytown	AA1 1AA	08/03/02	Archive	Delete	
Mr	Barry	Bridges	2	21 Burlington Crescent	Everytown	AA1 2BB	08/03/02	Archive	Delete	
Mr	Flora	Fletcher	6	61 Fairways	Neston	AA1 6FF	08/03/02	Archive	Delete	
Mrs	Glenda	Griffiths	7	71 Grassmere Road	Everytown	AA1 7GG	08/03/02	Archive	Delete	
Mr	Harry	Hitchcock	8	81 Harefield Avenue	Everytown	AA1 8HH	08/03/02	Archive	Delete	
Mr	Ian	Ibbotson	9	91 Icknield Way	Nexton	AA1 9II	08/03/02	Archive	Delete	
Mrs	Jean	Jackson	10	102 Juniper Close	Everytown	AA1 1JJ	08/03/02	Archive	Delete	
Mr	Keith	Keridge	11	112 Kestrel Crescent	Everytown	AA1 1KK	08/03/02	Archive	Delete	
Mrs	Linda	Lovjoy	12	122 Larkspur Road	Everytown	AA1 2LL	08/03/02	Archive	Delete	
Mr	Michael	Middleton	13	132 Meadow Close	Everytown	AA1 377	08/03/02	Archive	Delete	
Mrs	Nina	Nelson	14	142 Newly Street	Nexton	AA1	08/03/02	Archive	Delete	
Mr	Owen	Overdore	15	152 Orchard Way	Everytown	AA1 500	08/03/02	Archive	Delete	
Mr	Peter	Piper	16	162 Peach Drive	Everytown	AA1 6PP	08/03/02	Archive	Delete	
Mr	Quentin	Quarrelsome	17	172 Quality Street	Everytown	AA1 7QQ	08/03/02	Archive	Delete	
Mrs	Rosalind	Richards	18	182 Richmond Road	Nexton	AA1 8RR	08/03/02	Archive	Delete	

New 'summary view'

A newly-created 'summary' page now appears on selecting a specific donor from the 'Donors List' via last name click. This shows all the salient information about that donor 'at a glance'. Apart from name, address and status, this also displays **notes** and **donation history**, with up to 50 donations to view. Older donations appear on subsequent pages.

This display now introduces **editing of donations from the donor record** – useful if many edits are needed for one particular donor. Previously, editing of donations could only be done via an individual search on the 'donation entry' page for each donation record to be edited.

The list can be sorted via the following headings: Date, Amount, Claim Gift Aid, Fund and Payment Type. The default export format is by date.

Donors can also be archived or re-activated from this view, without the need to access full donor details.

New side panel

The same 'side panel' style as the donors list is used to offer options for drilling down into the record for that donor.

The standard menu includes:

- editing the record
- archiving the donor
- exporting donation records for that donor
- generating a statement for the last year's donations

Selecting 'edit donor details' produces a simpler version of the previous donor record, without the lengthiness of extra buttons for finding donation records and dealing with retrospective donations.

The default statement from this view gives a donations report for the last 365 days. A dialogue allows easy navigation to the 'donor statements' page if the report is required by tax year instead.

Mrs Avril Amethyst

Summary

311 Diamond Drive
Everytown
AA1 3J1

Reference: 511
Gift Aid Status: non-taxpayer
Notes: none

Adding donations to GASDS
Some of this donor's donations are not marked for reclaim under Gift Aid, but may be eligible for reclaim under GASDS.
[View them here](#)

Date	Amount	Tax	Total	Claim Gift Aid?	Claim Date	Fund	Payment Type
20/01/17	£10.00	£0.00	£10.00	No	not claimed	Parish Fund	Envelopes
19/11/13	£15.00	£0.00	£15.00	No	not claimed	Parish Fund	Cash
25/10/13	£25.00	£0.00	£25.00	No	not claimed	Parish Fund	Cash
27/08/13	£10.00	£0.00	£10.00	No	not claimed	Parish Fund	Cash
24/03/13	£20.00	£0.00	£20.00	No	not claimed	Parish Fund	Cash

Legend: Date, Amount, Tax, Total, Claim Gift Aid?, Claim Date, Fund, Payment Type

Retrospective and non tax-paid GASDS qualifying situations

Where a donor is a non-taxpayer, Fund Filer will alert the user if GASDS-eligible donations are present - donations of £20 or less – and give the option to view and add these to a future claim. Previously, this could only be done either from the GASDS page or when starting a new repayment claim.

Fund Filer will display similar information if a previously non-tax-paying donor becomes newly-marked as a taxpayer. The classic situation where this becomes very useful is if there is a delay between a taxpayer starting to give and completing a Gift Aid declaration.

Fund Filer will indicate if there are donations which have become eligible for a future claim under retrospective claiming rules. These rules allow a window of up to four accounting years from the year in which the donation was made for Gift Aid to be claimed.

Alerts for retrospective claiming and adding donations to GASDS will only appear where appropriate. If no relevant donations are present for that donor, no reference to these features will appear, keeping the user interface as clutter-free as possible.

The screenshot shows the Fund Filer interface for a donor named Mrs Avril Amethyst. The donor's status is 'non-taxpayer'. A callout box highlights the 'Adding donations to GASDS' section, which includes a message: 'Some of this donor's donations are not marked for reclaim under Gift Aid, but may be eligible for reclaim under GASDS.' Below this message is a 'View them here' button. A table of donations is visible below the callout.

Date	Amount	Tax	Total	Claim Gift Aid?	Claim Date	Fund	Payment Type		
20/01/17	£10.00	£0.00	£10.00	No	not claimed	Parish Fund	Envelopes	Edit	Delete
19/11/13	£15.00	£0.00	£15.00	No	not claimed	Parish Fund	Cash	Edit	Delete

The screenshot shows the Fund Filer interface for the same donor, Mrs Avril Amethyst, but her status is now 'taxpayer'. A callout box highlights the 'Reclaiming donations retrospectively' section, which includes a message: 'Some of this donor's donations are not marked for reclaim, but this donor is now recorded as a taxpayer and you may be able to reclaim tax for these donations.' Below this message is a 'View them here' button. A table of donations is visible below the callout.

Date	Amount	Tax	Total	Claim Gift Aid?	Claim Date	Fund	Payment Type		
19/11/13	£15.00	£0.00	£15.00	No	not claimed	Parish Fund	Cash	Edit	Delete
19/11/13	£15.00	£0.00	£15.00	No	not claimed	Parish Fund	Cash	Edit	Delete