A handy summary of our Charity Helpguides, designed to help you get the most out of using Virgin Money Giving. To view all the helpguides available go to vmgiving.co/charityhelpguides
REGISTERING YOUR CHARITY

Part 1 - Setting up your charity's account

There are two parts to registering your charity with us - when both are complete your charity’s page will appear on Virgin Money Giving and we’ll start collecting donations for you.

STEP 1
Click here to Register your charity or visit our homepage to start.

STEP 2
We’ll ask for your charity’s name, registered number, registered address and the administration address (if it’s different to the registered address).

We’ll also ask for your contact details so we can get in touch if we need to.

STEP 3
Please tell us your date of birth and choose a password. You’ll need this to sign into your charity’s account.

STEP 4
You’ll see a screen thanking you for registering and we’ll send you a confirmation email.

Your charity will now have a Virgin Money Giving account. If there are other people at your charity who need access to it (for example to help complete part 2), simply sign in and click ‘add users’.

It’s up to you what to do next - start part 2 straightaway or come back later.
Part 2 – Activating your account and building your charity’s page

**STEP 1**
Sign into your charity’s account - you’ll see a checklist of things we need from you.

**STEP 2**
Please work through the checklist. The details you give us will be used to build your charity’s Virgin Money Giving page. The different sections of the checklist will be updated to say ‘complete’ when we’ve got all the information we need.

You don’t need to complete the checklist in one go – take as long as you need.

Here’s what we ask for in the checklist:

- Some forms about Gift Aid and your charity’s bank account. These will be sent to you with the confirmation email at the end of part 1. Please print them, fill them in and post them back to us. (When we get the forms back and have processed them we’ll update the checklist to say ‘complete’.)
- Your charity category and a description of the work you do so fundraisers can look you up by the good causes you support.
- Your logo.
- Details of your charity’s trustees.
- A few more details about your charity to put on your page.
- Your charity’s £150 + VAT start-up fee.

**STEP 3**
The last section of the checklist is called ‘Virgin Money Giving’ – we’ll complete this for you when we’ve finished the work we need to do at our end.

**STEP 4**
When all the items on the checklist are complete, your charity’s Virgin Money Giving page will be up and running on our website and we can start collecting your donations.

If you want to add more pages, wording and pictures to your charity’s page, check out our help guide to setting up your charity’s page.
SETTING UP YOUR CHARITY’S PAGE

When you register your charity with us, we use the details you give us to build you a simple Virgin Money Giving page.

If you like you can then customise your page with links, text and photos and add more pages. Here’s how:

Updating your page

When you register your charity, we set up a simple Virgin Money Giving page for you with these features:

> Your charity’s name and logo.
> A panel with links to all of your charity’s pages. There won’t be many links to begin with but if you decide to add more pages, fundraisers can use this panel to find the information they need quickly and easily.
> A ‘support us’ box. This is a quick way for people to make a donation, set up a monthly donation or start fundraising for your charity.
> A ‘charity details’ box with your address, email, phone number and website.

To update the information on this page, simply sign into your charity’s Virgin Money Giving account and choose ‘charity page’. You’ll see a preview of your page – just type in your changes then click ‘save’ when you’re happy.

Add new pages and remove any you don’t need

Sign into your charity’s Virgin Money Giving account and choose ‘charity page’. You’ll see a preview of your page with some ‘page options’ at the top:

> Click ‘add another page’ to set up a new page. You’ll be asked to give your page a title then you can add text, photos and links to the page.
> To delete a page, make sure you’re on the page you’d like to remove then click ‘remove page’. Please note you won’t be able to remove your charity’s homepage or the ‘events’ page.
> If you’ve made changes to one of your charity’s pages but decide you preferred it how it was before, just click ‘exit without saving changes’. Otherwise click the ‘save’ button when you’re happy.
Add text

Whether you’re updating a page or adding a new one, you can type in text wherever you see this box:

Use the tools at the top of the box to customise your words – make them bold, italic, different colours and sizes to suit you. If you’re not sure what a tool does, just hold your mouse over it until the name tag appears.

When you’re happy with your text, just click the ‘save’ button at the top of your page.

Upload your photos

Sign into your charity’s Virgin Money Giving account and choose ‘charity page’. You’ll see a preview of your page with an ‘add widgets’ section at the top.

Tick the box next to ‘photo gallery’ and you’ll get step-by-step instructions on screen of how to upload your photos. If you need any help at this stage, check out our guide to uploading photos.
FORMS WE NEED FROM YOUR CHARITY

Although charities register with us online, there are some forms you’ll need to fill in and post back to us.

**STEP 1**
When you register we’ll send you an email with two forms attached:

> **ChV1 – Gift Aid form**
  We’ll need this to collect Gift Aid on behalf of your charity. You’ll need to complete page 1 (boxes 1 - 8) and page 6. Then print the form and sign in ink on Page 6 and send to us at the address below.

Please do not send any forms to HMRC Charities team as stated on the ChV1 form as this will result in your application and/or Gift Aid payments being delayed.

> **Bank details form**
  This is the details of the bank account you’d like donations to be paid into. If you’d like to collect fundraising event fees through Virgin Money Giving, you can print this form again and add a separate ‘trading account’ for the fees to be paid into.

**STEP 2**
Please print the forms out, fill them in and post them back to us at the address below. If you need more copies of the forms, you also can download them by signing into your charity’s Virgin Money Giving account and going to the ‘Forms’ section.

    Virgin Money Giving  
    28 St Andrews Square  
    Edinburgh  
    EH2 1AF

For every bank account you tell us about, please include a bank statement. These statements need to be originals rather than photocopies and dated within the last 3 months.

Once your charity’s account is up and running you’ll be able to add more bank accounts whenever you like.

**STEP 3**
When we receive your forms, we’ll update the ‘forms’ section of your charity’s Virgin Money Giving account to say ‘complete’ and post your bank statements back to you.
YOUR CHARITY’S SET-UP FEE

We ask charities for a set-up fee when they register with us. It’s a single payment of £150 + VAT and because we’re not-for-profit, this is just to cover our costs.

We’ll only ask for this payment once - there are no monthly or annual charges to use Virgin Money Giving. Find out more about our fees.

There are three different ways your charity can pay the set-up fee and with each option you’ll have the chance to print an invoice for your charity’s records.

Here are the different ways you can pay:

Pay by card

**STEP 1**
Sign into your charity’s account and choose ‘set-up fee’ from the checklist.

**STEP 2**
Pick ‘credit or debit card’ as your payment method, then click ‘next’ to go to the payment screen.

**STEP 3**
Type in your card details then click ‘next’.

**STEP 4**
Next you’ll see a summary of your payment. Have a read through and check everything is correct. When you’re happy click ‘make payment’.

**STEP 5**
You’ll see a confirmation screen letting you know we’ve received your set-up fee.

We’ll take the payment from your card within a few days and it will show on your bank statement as ‘Virgin Money Giving’. We’ll update the ‘set-up fee’ section of the checklist to say ‘complete’ when the payment has cleared.
Pay by direct transfer

**STEP 1**
Sign into your charity's account and choose ‘**set-up fee**’ from the checklist.

**STEP 2**
Pick ‘direct transfer’ as your payment method, then click ‘save’ to confirm this is how you’re going to pay.

**STEP 3**
Please arrange for your bank to pay the money into our account and use your charity’s name and invoice number as the payment reference.

These are our account details:

<table>
<thead>
<tr>
<th>Account name</th>
<th>Virgin Money Giving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account number</td>
<td>00999143</td>
</tr>
<tr>
<td>Sort code</td>
<td>30-00-02</td>
</tr>
<tr>
<td>Bank address</td>
<td>Lloyds TSB</td>
</tr>
<tr>
<td></td>
<td>City Office</td>
</tr>
<tr>
<td></td>
<td>Bailey Drive</td>
</tr>
<tr>
<td></td>
<td>Gillingham Business Park</td>
</tr>
<tr>
<td></td>
<td>Kent</td>
</tr>
<tr>
<td>Postcode</td>
<td>ME8 0LS</td>
</tr>
</tbody>
</table>

**STEP 4**
We’ll update the ‘set-up fee’ section of the checklist to say ‘complete’ when the payment has cleared.

Pay by cheque

**STEP 1**
Sign into your charity’s account and choose ‘**set-up fee**’ from the checklist.

**STEP 2**
Pick ‘**cheque**’ as your payment method, then click ‘**save**’ to confirm this is how you’re going to pay.

**STEP 3**
Please send your cheque to the address below. Please make it payable to ‘**Virgin Money Giving**’, and write your charity name and invoice number on the back. Please include a copy of your invoice too.

**Virgin Money Giving**
28 St Andrews Square
Edinburgh
EH2 1AF

**STEP 4**
We’ll update the ‘set-up fee’ section of the checklist to say ‘complete’ when the payment has cleared.
SIGNING IN

Once you’ve registered with Virgin Money Giving it’s really easy to sign in:

STEP 1
Click the ‘sign in’ button at the top right of the screen. You’ll see this button on every page of Virgin Money Giving.

STEP 2
Type in your date of birth and the email address you gave us when you registered, then click ‘next’.

STEP 3
You’ll be asked for 2 characters from your password. Please note you’ll be asked for a different combination of characters each time you sign in.
If you used a mix of lower and upper case letters when you created your password, remember to use them when you sign in.
If you’ve forgotten your password, please click here for our help guide.

FORGOTTEN YOUR PASSWORD

If you’ve forgotten your password there are two ways you can request a new one.

You can also follow these steps if you’ve been temporarily blocked from your charity’s Virgin Money Giving account because the wrong sign in details were used several times in one day.

Follow the ‘forgotten your password?’ link

STEP 1
Click the ‘sign in’ button at the top right of the screen. You’ll see this button on every page of Virgin Money Giving.

STEP 2
Type in your date of birth and the email address you gave us when you registered, then click ‘next’.

STEP 3
You’ll see a screen asking for 2 characters from your password. Simply click the ‘forgotten your password?’ link and we’ll email you a new password.

This password is only temporary – you’ll be asked to think of a new one when you next sign into Virgin Money Giving.

Ask someone else at your charity to reset your password

Ask someone at your charity who has access to the ‘account users’ section to reset your password.
We’ll email you a temporary password and you’ll be asked to think of a new one when you next sign into Virgin Money Giving.
**RESET YOUR PASSWORD**

If you’ve got access to the ‘account users’ section of your charity’s Virgin Money Giving account, you can reset someone else’s password if they forget it.

You can also follow these steps if a user has been temporarily blocked from your charity’s Virgin Money Giving account because their sign in details were typed in wrong several times in one day.

**PLEASE NOTE, ACCOUNT USERS CAN RESET THEIR OWN PASSWORDS BY FOLLOWING OUR HELP GUIDE.**

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Choose ‘account users’ and then ‘update account users’.

**STEP 3**
You’ll see a list of all the people who have access to your charity’s Virgin Money Giving account. Click the name of the person who needs their password resetting.

**STEP 4**
The account user’s details will be shown on the right of the screen – click ‘update/delete’, then ‘reset password’.

**STEP 5**
The account user will be sent an email with a temporary password. They can use this to sign into Virgin Money Giving, then they’ll be asked to make up a new password of their own.
ADDING ACCOUNT USERS

You can add as many people as you like to your charity’s Virgin Money Giving account, and decide which areas of the account they can access. They’ll all get their own passwords to sign in with.

The first account user is set up when you register your charity with us – this person will have access to all areas of the charity’s account, and they’ll be able to start adding other people as account users.

When you add someone to your account, you’ll need to know their:

> email address
> date of birth
> occupation
> telephone number

Here’s how to add someone as an account user:

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Click ‘account users’ and then ‘update account users’.

**STEP 3**
Click the ‘add new user’ button at the bottom right of the screen.

**STEP 4**
First, fill in the boxes with the new user’s details. You can then tick the boxes to decide which areas of the account they’ll be able to access.

**STEP 5**
Click ‘save changes’ to set up the new account user.

**STEP 6**
We’ll email the new account user with a temporary password. They’ll be asked to make up their own password when they sign in for the first time.
CHANGING AN ACCOUNT USER’S DETAILS

Once someone has been added as an ‘account user’ and given their own password to sign into your charity’s Virgin Money Giving account, anyone at your charity with access to the ‘account users’ section can update their details.

STEP 1
Sign into your charity’s account.

STEP 2
Choose ‘account users’ and then ‘update account users’.

STEP 3
You’ll see a list of all the people who have access to your charity’s Virgin Money Giving account. Click the name of the account user you’d like to update.

STEP 4
The account user’s details will be shown on the right of the screen – click ‘update/delete’. You can now make these changes:

> Update personal details
  Click in the boxes and make your changes. When you’re happy, click ‘save changes’.

> Reset password
  Click the ‘reset password’ button at the bottom of the screen. The account user will be sent an email with a temporary password. They can use this to sign into Virgin Money Giving, then they’ll be asked to make up a new password of their own.

> Update which parts of the account they can access
  You’ll see a list of the different areas of your charity’s Virgin Money Giving account. Tick the boxes next to the areas you’d like them to have access to.

When you’re happy, click ‘save changes’.

> Delete a user
  To delete someone as an account user, click the ‘delete user’ button at the bottom right of the screen. You’ll be asked to confirm your choice before the account user is removed.
MANAGING ACCESS TO YOUR CHARITY’S ACCOUNT

Whenever someone is added to your charity’s Virgin Money Giving account as an ‘account user’, you’ll be asked to pick which areas of your charity’s account they can and can’t use.

To help you decide who needs access to what, the table below lists the things you can do in each section. For example, if you have access to ‘events’ you can set up fundraising events on Virgin Money Giving.

Here’s how you can change the areas of your charity’s account a person has access to:

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Go to ‘account users’ and then ‘update account users’.

**STEP 3**
You’ll see a list of all the people who have access to your charity’s Virgin Money Giving account. Click the name of the account user you’d like to update.

**STEP 4**
The account user’s details will show up on the right of the screen - click ‘update/delete’.

**STEP 5**
You’ll see a list of the different areas of your charity’s Virgin Money Giving account. Tick the boxes next to the areas you’d like them to have access to.

If an area is ticked and you don’t want them to be able to use this part of the account, click the box again to remove the tick.

When you’re happy, click ‘save changes’.
## Accessing Your Charity’s Account

<table>
<thead>
<tr>
<th>Area of Your Charity’s Account</th>
<th>What Account Users Can Do in This Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Update Account Users</strong></td>
<td>&gt; Add new people as account users – they’ll get a password to sign in.</td>
</tr>
<tr>
<td></td>
<td>&gt; Delete people from the account if they don’t need to use it anymore.</td>
</tr>
<tr>
<td></td>
<td>&gt; Update account users’ details.</td>
</tr>
<tr>
<td></td>
<td>&gt; Reset passwords.</td>
</tr>
<tr>
<td></td>
<td>&gt; Update who can use which parts of the account.</td>
</tr>
<tr>
<td></td>
<td>&gt; View details of all the account users.</td>
</tr>
<tr>
<td><strong>Update Account</strong></td>
<td>&gt; Change your charity’s administration or registered address.</td>
</tr>
<tr>
<td></td>
<td>&gt; Manage your charity’s bank accounts.</td>
</tr>
<tr>
<td></td>
<td>&gt; Change your charity’s logo.</td>
</tr>
<tr>
<td></td>
<td>&gt; Change your charity’s description.</td>
</tr>
<tr>
<td></td>
<td>&gt; Change your charity’s basic information and contact details.</td>
</tr>
<tr>
<td></td>
<td>&gt; Change the categories your charity is listed under on Virgin Money Giving.</td>
</tr>
<tr>
<td><strong>Events</strong></td>
<td>&gt; Set up new fundraising events.</td>
</tr>
<tr>
<td></td>
<td>&gt; Update event details.</td>
</tr>
<tr>
<td></td>
<td>&gt; Add your charity to events which are set up by other charities or organisations.</td>
</tr>
<tr>
<td></td>
<td>&gt; Cancel events.</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>&gt; Have full access to your charity’s reporting system.</td>
</tr>
<tr>
<td><strong>Charity Page</strong></td>
<td>&gt; Set up new pages for your charity on Virgin Money Giving.</td>
</tr>
<tr>
<td></td>
<td>&gt; Add, edit or delete text, photos and links from your charity’s pages.</td>
</tr>
<tr>
<td><strong>Email Alerts</strong></td>
<td>&gt; Pick the things you’d like us to keep you updated on (e.g. we’ll email you when you receive a large donation).</td>
</tr>
<tr>
<td><strong>Forum</strong></td>
<td>&gt; Post in the Virgin Money Giving forum on behalf of your charity.</td>
</tr>
</tbody>
</table>
ADDING OR REMOVING PAGES

You can add or remove pages from your main charity page whenever you like.

Adding a new page

**STEP 1**
Sign into your charity’s account and go to ‘charity page’.

**STEP 2**
Your charity’s main page will be shown. Click ‘add another page’ at the top of the screen.

**STEP 3**
You can then add content to your new page. Make sure you include a title for your page - this will appear in the panel on the left so fundraisers can find the page easily.

**STEP 4**
When you’re happy with your new page, click ‘publish’ to add it to Virgin Money Giving. If you don’t want to save your changes, click ‘exit without saving changes’.

Removing a page

**STEP 1**
Sign into your charity’s account and go to ‘charity page’.

**STEP 2**
Your charity’s main page will be shown. Using the panel on the left, go to the page you’d like to remove. Please note you can’t delete the homepage or events page.

**STEP 3**
When you’re on the right page, click ‘remove page’ at the top of the screen. Click to confirm that you’d like it to be permanently removed – then we’ll delete it straightaway.
UPDATING YOUR CHARITY PAGE

You can add more content and update your charity’s page whenever you like. If you need to add or remove pages, click here.

**STEP 1**
Sign into your charity’s account and go to ‘charity page’.

**STEP 2**
Your charity’s main Virgin Money Giving page will be shown. You can update the content on this page by clicking in the text boxes and typing in your changes.

**STEP 3**
If you’d like to make changes to a different page, click on the page you’d like to update in the panel on the left. Your chosen page will then be displayed, and you can edit the content.

**STEP 4**
When you’re happy with your changes, click ‘publish’.

If you’d like to update an event, you’ll need to make the changes in the ‘events’ section. Or if you need to update your contact information or charity’s description, click on ‘update account’.

CHANGING YOUR CHARITY’S VIRGIN MONEY GIVING WEB ADDRESS

We create your charity’s Virgin Money Giving web address (URL) using your charity’s name.

If you’d like to change your address please let us know - for example if you change your name or prefer to use a shortened version.

Please email us at theteam@virginmoneygiving.com or call us on 03456 01 10 45. We’re here Monday to Friday, 9am - 5:30pm.
ADDING PHOTOS TO YOUR PAGE

We’ve teamed up with Google Photos so you can share your charity’s photos on Virgin Money Giving.

All you need to do is create a Google Photos album and add it to your charity’s Virgin Money Giving page.

Here’s how:

STEP 1
CREATING YOUR ALBUM WITH GOOGLE PHOTOS

> First you need to set up a Google Photos account. Visit http://photos.google.com, and sign in with your Google ID or select ‘create account’ if you don’t have one.

> When you have logged in, click the cloud icon (‘upload photos’) at the top of the screen. Find the photos you would like to feature on your charity’s Virgin Money Giving page on your computer, click on them, then click on ‘OK.’

> A box will appear, select the option to ‘add to album,’ then click ‘new album’ and name your album on the next screen. You have now created an album.

> You then need to turn on sharing for this album by selecting ‘more options’ in the top right. From this menu, select ‘sharing options,’ then ‘turn on sharing options’ to make sure we can share your album.

STEP 2
ADDING A PHOTO GALLERY

Please pick an option below:

I’m in the process of registering my charity with Virgin Money Giving

> After you’ve completed the first part of the registration process and receive a confirmation email from us, sign into your charity’s new Virgin Money Giving account.

> You’ll see a checklist of information we need from you – this is the second part of the registration process and we’ll use the details you give us in the checklist to build your charity’s page.

> Click ‘Create page’ on the left at any time to see a preview of how your charity’s page looks so far.

> Tick the ‘photo gallery’ box at the top of this preview page to get started.
My charity already has a Virgin Money Giving page

> Sign into your charity’s Virgin Money Giving account and click ‘charity page’ on the left - you’ll see a preview of your charity’s main page. If you’d like to add the photo gallery to this page, simply tick the ‘photo gallery’ box at the top of the page to get started.

STEP 3
ADDING YOUR PHOTOS

> Now you’ve added our photo gallery option on your charity’s Virgin Money Giving page and have created a Google Photos album you can add this to your Virgin Money Giving page. You can only show one photo album on your page at a time, but you can change albums whenever you like.

> Click ‘add photos’ under the photo gallery on your Virgin Money Giving page. A box will appear – click ‘choose album.’

> Enter your Google email address and follow the instructions to select your album and upload it to your Virgin Money Giving page.

STEP 4
UPDATING YOUR PHOTOS

> Once you’ve got your photos on your Virgin Money Giving page it’s really easy to add more or change albums. Click ‘update my photos’ under your photo gallery then follow the instructions on screen.
PROMOTING MY CHARITY

We’ve developed a range of buttons and banners to help you make your links to virginmoneygiving.com stand out and attract attention, helping you raise more.

These buttons can promote direct donations to your charity through virginmoneygiving.com

<table>
<thead>
<tr>
<th>Description</th>
<th>Dimensions</th>
<th>Thumbnail (click to enlarge)</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a donation banner (small)</td>
<td>106 x 139</td>
<td><img src="mmg_small.png" alt="Make a donation banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Make a donation banner (medium)</td>
<td>211 x 85</td>
<td><img src="mmg_medium.png" alt="Make a donation banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Make a donation banner (large/blue)</td>
<td>261 x 88</td>
<td><img src="mmg_large_blue.png" alt="Make a donation banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Make a donation banner (large/red)</td>
<td>261 x 88</td>
<td><img src="mmg_large_red.png" alt="Make a donation banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
</tbody>
</table>
And to help your fundraisers raise as much money as possible, you may want to encourage them to set up their own fundraising page with virginmoneygiving.com

<table>
<thead>
<tr>
<th>Description</th>
<th>Dimensions</th>
<th>Thumbnail (click to enlarge)</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraise for us banner (small)</td>
<td>106 x 139</td>
<td><img src="thumb_small.png" alt="Small Banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Fundraise for us banner (medium)</td>
<td>211 x 85</td>
<td><img src="thumb_medium.png" alt="Medium Banner" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Fundraise for us banner (large/blue)</td>
<td>261 x 88</td>
<td><img src="thumb_large_blue.png" alt="Large Banner (blue)" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
<tr>
<td>Fundraise for us banner (large/red)</td>
<td>261 x 88</td>
<td><img src="thumb_large_red.png" alt="Large Banner (red)" /></td>
<td>Instructions on how to add it to your site</td>
</tr>
</tbody>
</table>
INTRODUCTION TO REPORTING

We’ve created a range of easy-to-use reports to help you analyse all the fundraising activity that’s happening for your charity.

There’s standard reporting that gives you the key information you need, and more flexible reporting, where you can tailor the format and even create your own reports from scratch.

We’ve made it as user-friendly as we can, but you’ll find help guides covering most of the things you’ll want to do as well. And if you get stuck, or you’ve got a more technical question, you can call our help desk team on 03456 01 10 45, we’re here Monday to Friday, 9am - 5.30pm or email theteam@virginmoneygiving.com.

Getting started

It’s best to start by looking through the report folders and getting familiar with the templates and reports available within each of them.

To see the reports and templates available in a folder, just click on the ‘+’ sign next to the folder name.

The reports are grouped into subfolders by report type (e.g. standard or flexible) and then by content (e.g. donations, fundraising pages, events). Again, just use the ‘+’ sign to drill down to the next level.

Once you’ve been through the report folders, have a look at the other help guides – these cover the main things you may want to do. Or you can just have a play around with the functionality and start running your own reports.

Our reporting tool works best with Internet Explorer 7 or higher, or Firefox 3 or higher. You can find out which browser version you are using by clicking ‘Help’ on the toolbar at the top of your browser and then ‘About Internet Explorer’ or ‘About Firefox’.

To upgrade your browser use the links below or speak to your IT department.

Update Internet Explorer
Update Firefox
SEARCH FUNCTION

If you want to find out more information about a fundraiser, fundraising page or donor you can use the search function within the ‘Manually allocate reporting codes’ screen. Here’s how:

**STEP 1**
Sign in to your charity’s account.

**STEP 2**
Go to ‘Reporting’ and then ‘Manually allocate reporting codes’.

**STEP 3**
Select the tab you want to enquire about e.g. fundraisers.

**STEP 4**
You can choose to see all records, or those that don’t currently have any reporting codes allocated. Each tab also contains a number of search criteria including surname, postcode, fundraising page URL and date range. If you’ve already set values for your reporting codes, you can search by reporting code too. Simply enter your criteria, and click ‘Search’.

**STEP 5**
You can then click through each record in the search results using the ‘Next’ and ‘Previous’ buttons. You can also navigate by entering a page number in the box and clicking ‘Update’. Results appear in alphabetical order based on surname or event name.
## TYPES OF REPORT

We have a range of reports for you to use, depending on the level of detail you need.

There are three main report templates you can use - ‘**Standard**’, ‘**Flexible**’ and ‘**Custom code (for bulk uploads)**’. You can also create your own customised reports in a number of different formats using the data fields we provide.

### Standard reports

These reports are ready to use and cover the basic information we think most charities will be interested in, like your biggest single donations or your best fundraisers. They’re designed to be printed but can’t be edited and aren’t suitable for exporting into other systems.

<table>
<thead>
<tr>
<th>Donation reports</th>
<th>Event reports</th>
<th>Transaction reports</th>
<th>Summary reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct donations</td>
<td>Events</td>
<td>Statement summary</td>
<td>Donation summary</td>
</tr>
<tr>
<td>Donations by page</td>
<td>Event registration details</td>
<td>Payment details donations</td>
<td>Events summary</td>
</tr>
<tr>
<td>Top donations</td>
<td></td>
<td>Payment details event registration fees</td>
<td></td>
</tr>
<tr>
<td>Donor reports</td>
<td>Fundraiser reports</td>
<td>Payment details Gift Aid</td>
<td>Fundraising summary</td>
</tr>
<tr>
<td>First time donors</td>
<td>First time fundraisers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donors</td>
<td>Not currently fundraising</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular donors</td>
<td>Top fundraisers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lapsed regular donors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top donors</td>
<td>Fundraising pages reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New fundraising pages</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Open fundraising pages</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Flexible reports

Flexible reports are more suited to being exported to other systems or opened as spreadsheets for editing. These report templates cover most of the key data we think you might need, but also give you the flexibility to add, remove, reorder and reformat the information.

- Donations flexible
- First time donors flexible
- Events flexible
- Event registrations flexible
- Payment event registration fees flexible
- First time fundraisers flexible
- Fundraising pages flexible
- Fundraising pages flexible - single date
- Payment donations flexible
- Payments Gift Aid flexible

Custom code reports

Our custom code bulk upload function makes it quick and easy for you to update lots of records at once. We have three reports designed to be used for the bulk upload of your custom codes.

- Custom codes fundraisers
- Custom codes fundraising pages
- Custom codes donors

Creating your own reports

You can also build your own reports from scratch in a variety of formats. You can create them as tables (like our flexible reports), as graphs or as cross tabs (for more detailed analysis). All of these formats can be saved as templates for future use, but the cross tabs are better suited to on-screen analysis.

Read our guide to creating your own reports

RUNNING A REPORT

Whether you’re looking to run a standard or flexible report, it’s straightforward to do. Here’s how:

**STEP 1**
Tick the box next to the flexible report you want to run (this highlights the row).

**STEP 2**
Either click on the report name or click on the ‘running man’ icon.

**STEP 3**
If you need to specify a date range for the report, you’ll be asked to enter this.

The report will default to displaying as HTML, but you have the option to change the format if you want to.
GETTING ACCESS TO EDIT AND CREATE REPORTS

Named people in your charity can be set up to edit our flexible reports or create their own reports on the Virgin Money Giving site.

If you can’t see a blue ‘Create reports’ tab next to the red ‘View reports’ tab, you aren’t currently set up to create and edit reports. Speak to the person in your charity who gave you access to the Virgin Money Giving site and ask them to change your permissions to include ‘report creation’.

If you can see the blue ‘Create reports’ tab, here’s how to get started:

**STEP 1**
Tick the box next to the flexible report you want to edit (this highlights the row).

**STEP 2**
Click on the ‘edit’ icon for that report – this opens the ‘Flexible report editor’ screen, where you can edit or customise the report (see ‘Editing our flexible reports’ for more info).
EDITING OUR FLEXIBLE REPORTS

This is where our reporting functionality really comes into its own. Here you can tailor our flexible reports to give you the information you need, in the format you need it in.

We’ve picked out a few of the key tasks you’re likely to want to carry out. But it’s worth having a play around. Try a few things and see what works for you. Don’t worry, you can’t break it or delete any data. And if you really get stuck, you can call our help desk team on 03456 01 10 45 or email theteam@virginmoneygiving.com.

Getting started

If you can see the blue ‘Create reports’ tab, here’s how to get started:

**STEP 1**
Tick the box next to the flexible report you want to edit (this highlights the row).

**STEP 2**
Click on the ‘edit’ icon for that report – this opens the ‘Flexible report editor’ screen.

The columns we’ve already set up are displayed on the right hand side.

The ‘Available fields’ box on the left shows the additional data we’ve made available for this report.

**STEP 3**
The ‘Flexible report editor’ screen includes a sample of your data to help you visualise what you’re designing, but if you click on the ‘Toggle’ button the report will show all data for the selected period, click it again to return to the sub-set view.

**STEP 4**
You can run your reports using the ‘Run’ icon. The report will be generated in a different window.

**STEP 5**
To return to ‘edit’ mode, close the window from Step 4.
Data filters

Please note, the first time you edit a flexible report, there’ll be limited data displayed. This is because the data filters default to showing just one day of data, for simplicity.

Here’s how to change the filters to show a wider range of data:

**STEP 1**
Click on the ‘Change filter’ icon.

**STEP 2**
This will launch the filter options for this report, click on ‘OK’

Saving changes

It’s important to save any changes you make so you can reuse that version of the report whenever you want to.

**STEP 1**
Click the ‘Save report as’ button.

**STEP 2**
A pop-up will ask you to name this version and say where you want to save it (the original name will appear but you can change this to whatever you want).

**STEP 3**
Click on the ‘Browse’ button to display the folders in ‘My charity’s reports’ where you can save your report.

**STEP 4**
Once you’ve decided where you want to save the report, click the ‘save’ button.

We recommend saving your flexible and customised reports in ‘Report templates’ within ‘My charity’s reports’ – this will keep your templates separate from any scheduled outputs and make things easier for you.
Removing columns

To remove a column simply ‘drag and drop’ it into the ‘Available fields’ box on the left hand side. Here’s how:

**STEP 1**
Click on the column you want to remove and hold the left-hand mouse button down.

**STEP 2**
Drag the column over to the ‘Available fields’ box.

**STEP 3**
Release the button when you’re ready to drop the column.

Alternatively, right-click on the column and select ‘Remove from table’. Removed columns appear in the ‘Available fields’ box and can be reselected at a later date.

If you want to select more than one column at a time, hold down the control key (Ctrl) while you ‘drag and drop’ the columns.

Changing the column order

Select the column you want to move and ‘drag and drop’ it where you want in the report.

Alternatively, move the column one position at a time by right-clicking on it and using the ‘Move left ←’ or ‘Move right →’ options.
Adding a subtotal

Right-click on the column you want a subtotal for, and then click on the ‘Add summary’ menu option.

This defaults to a ‘sum’ of the column values. However, you can change this to make other calculations like ‘average’, ‘minimum’ and ‘maximum’ just by right-clicking on the total and selecting the ‘Change function’ menu option.

Changing the data format

We’ve provided the data in a format to suit many charities, but you may want to change the way it’s formatted e.g. to see dates or add currency formatting.

Simply right-click on the column to be changed and then select the ‘Change data format’ menu option. This will bring up the alternative formats.

Adding a data item

To add a data item simply ‘drag and drop’ it from the ‘Available fields’ box to the right hand side. Here’s how:

**STEP 1**
Click on the data item you want to add and hold the left-hand mouse button down.

**STEP 2**
Drag the column over to the right hand side. The item will go brown when it’s okay to release the button.

**STEP 3**
Release the button when you’re ready to drop the data item in.
The data item will automatically be added to the report.

Alternatively, a data item can be added to the end of your report by clicking on the small arrow to the left of the data item.
Grouping data

Grouping the data within a report allows you to organise the information into sections, with clear breaks in between, and add subtotals for each of these sections. You can also create subgroups to divide up the information even further.

Here’s how to group data within a report:

**STEP 1**
If the field you want to group by is in ‘Available fields’, simply ‘drag and drop’ it on the ‘red arrow’ above. (If the field is already in the report, you’ll need to ‘drag and drop’ it from the report into ‘Available fields’ first.)

**STEP 2**
If you want to create sub-groups, simply repeat Step 1. The subgroups will follow the order you create them in. To change the order, you’ll need to ‘drag and drop’ the fields back into ‘Available fields’ and group them again in the order you want.

To remove a grouping, simply click on the bold group heading and select ‘remove from table’.

Our reporting tool works best with Internet Explorer 7 or higher, or Firefox 3 or higher. You can find out which browser version you are using by clicking ‘Help’ on the toolbar at the top of your browser and then ‘About Internet Explorer’ or ‘About Firefox’.

To upgrade your browser use the links below or speak to your IT department.

**Update Internet Explorer**
**Update Firefox**
SCHEDULING A REPORT

Scheduling is simple to do and can make life much easier for you. It lets you set up a report to run automatically so it’s waiting for you next time you log in.

The person creating the schedule is the only one in your charity who can amend or delete the schedule but the report will be saved in your charity’s reports folder for everyone to view.

Getting started

**STEP 1**
Tick the box next to the report you want to schedule.

**STEP 2**
Click on the schedule icon (either the one on the same row or the one near the top of the screen). A summary of the schedules set up for this report will appear (this will be blank when you use it for the first time).

**STEP 3**
Click on the ‘schedule job’ button to create a new schedule for this report (or ‘edit’ to amend an existing...
Setting up the schedule

You’ll see there are now four tabs of information to enter – ‘Job’, ‘Schedule’, ‘Parameters’ and ‘Output’ (‘Parameters’ will only appear where the report has a date range).

Here’s what to enter in each:

• ‘Job’
Enter a label for the job (the report name e.g. ‘Yesterday’s donations’) and a brief description, something that will remind you what the schedule is. Click the ‘next’ button.

• ‘Schedule’
Now enter the timings for the schedule – when and how often you want it to run, including an end date if you don’t want it to run after a specific date. Click on the ‘next’ button.

• ‘Parameters’
This tab lets you set the date range for the report itself. So if you want the report to cover a certain period (e.g. ‘previous week’), this will be applied every time the job is run automatically. Once you’re happy with the screen, click on the ‘next’ button.

• ‘Output’
This is where you specify what you want the output to look like. You’ll need to enter:

- A description of what it shows (e.g. yesterday’s donations).
- The format(s) you want the report in e.g. PDF or HTML.
- Where you want it to be saved (we recommend saving it to ‘saved reports’ in ‘My charity’s reports’).
- Whether you want a date and time stamp on it to prevent overwriting the previous file.

(Note, the report name must not include any spaces between words, so please use the underscore character ‘_’ if you want to make it easier to read.)

Finally, click the ‘save’ button to store all the details. The schedule will appear in the ‘schedule summary’ for this report and a ‘scheduled’ icon will appear next to the report name.
MANAGING YOUR REPORTS

Creating your own folders

You can create your own folders within ‘My charity’s reports’. The ‘Standard reports’ and ‘Flexible reports’ folders are set up by Virgin Money Giving and can’t be amended.

Here’s how to create folders within ‘My charity’s reports’:

STEP 1
Left click on the ‘My charity’s reports’ folder – this changes the ‘Add folder’ icon so it can be selected.

STEP 2
Click the ‘Add folder’ icon. When the pop-up appears, enter the folder name and click the ‘save’ button. Alternatively, you can right-click on the folder name to display a menu which includes an option to ‘Add folder’.

Your new folder will now appear within ‘My charity’s reports’

Renaming folders or reports

You can rename any folders or reports in ‘My charity’s reports’ – this is your own space within the reporting section.

As the folders and reports under ‘Standard reports’ and ‘Flexible reports’ are set up by Virgin Money Giving, you won’t be able to edit any of these names.

Here’s how to rename folders and reports under ‘My charity’s reports’:

STEP 1
To change a folder name, click on it and then click the ‘rename’ icon. To change a report name, tick the box to select the report and then click the ‘rename ’ icon.

STEP 2
When the pop-up appears, change the name and add a description if you like (for example, if you want to add extra information for a colleague).

STEP 3
Click the ‘save’ button.
Deleting reports

You can delete reports and folders in ‘My charity’s reports’ – this is your own space within the reporting section.

But remember – you’re acting on behalf of all your charity’s registered users, so if you delete a report they won’t be able to see it any more. And if you delete a folder, you’re also deleting the reports and subfolders within it.

To delete a folder:

**STEP 1**
Click on the folder name, then click the ‘delete’ icon. Or right-click on your mouse and select ‘delete’ from the menu.

**STEP 2**
When the pop-up appears, confirm you want to delete the folder.

SETTING UP REPORTING CODES

We know every charity has their own way of doing things, which is why we’ve designed reporting codes you can customise to fit your way of working.

For example, if every fundraiser has a reference number in your charity’s system, you could set up a custom field for these reference numbers on Virgin Money Giving too.

You can create up to 20 custom fields in the Virgin Money Giving reporting system – five fields each for donors, fundraisers, events and fundraiser pages.

You can use these fields to hold whatever data you like. To keep things simple, it’s a good idea to name the field to match your own system.

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Go to ‘reporting’ and then ‘set up reporting codes’.

**STEP 3**
Choose whether the field is for donors, fundraisers, events or fundraiser pages, and then type your field name into the box. Each field can contain letters or numbers, and can be up to 20 characters long.

**STEP 4**
When you’ve named as many custom fields as you need, click ‘save changes’ to finish. You add more or update your fields whenever you like.
CUSTOM CODES BULK UPLOADS

Our custom code bulk upload function makes it quick and easy for you to update lots of records at once. You can still allocate codes manually if you prefer, or if you only have a few to do, but we know many charities prefer to allocate codes outside of the Virgin Money Giving website and then upload them to our database.

Here’s a summary of the bulk upload process:

• Sign into the Virgin Money Giving website, access reporting and run one of our new custom code upload reports to see your existing data.
• Save the report as a CSV file to your PC.
• Import this file into our Excel template using the macro provided.
• At this stage, you can add, remove or amend the custom code data within the spreadsheet.
• Export the data from the spreadsheet using the macro provided and save it to your own computer as a CSV file.
• Sign into the Virgin Money Giving website and upload the file you’ve just exported.
• Assuming no errors are found, your codes will be updated in the Virgin Money Giving database and will appear in your reports the following day.

Please note, to use our custom code bulk upload function you’ll need to be using Excel version 2003 or above.

Custom code reports

We have three reports designed for you to transfer your existing data to the custom code spreadsheet and allocate your codes. There are reports for fundraisers, fundraising pages, and donors. You can use as many or as few of these reports as you want, whenever you want.

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘Reporting’, then ‘Reports’.

STEP 3
Expand the ‘Custom code upload’ folder and click on the ‘Source data’ folder. Choose which report you want to run and select the date range when prompted.

STEP 4
When the report is displayed, click on the CSV icon (top right). Then save this report to your own computer. This report is now ready to be imported into the custom code spreadsheet.

STEP 5
Close the reporting tool when you’ve finished with it.
Downloading the spreadsheet

To use our bulk upload function, you need to download the custom code spreadsheet from our website. You only need to download this once and save it to your own computer. It’s also worth checking the version number on the download page to make sure you’re using the latest one.

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Go to ‘**Reporting**’, then ‘**Reports**’.

**STEP 3**
Click on the ‘**Download**’ Excel image above the ‘next’ button. Depending on which version of web browser you’re using this will either prompt you to save it or open Excel automatically as a ‘read only’ file. Rename this file and save it to your own computer.
Using the spreadsheet

The spreadsheet uses macros to import, format and export data, so it’s important to enable macros every time you use this file. The spreadsheet automatically detects whether you have enabled macros and if not, will either prompt you to or tell you how to change your settings.

The following steps assume you’ve downloaded the spreadsheet and saved it to your computer, and you’ve run one of our custom code reports and saved it to your computer as a CSV file.

**STEP 1**
Open the spreadsheet and enable macros when prompted. If you’re not prompted follow the on-screen instructions.

**STEP 2**
The spreadsheet will open with the ‘Instructions’ tab displayed. You’ll use the macro buttons on this page to import and export your data.

**STEP 3**
Click on ‘Import data’ to select the custom code report you want to import. This checks the file is valid and then opens it before copying the data into the template. This only takes a few seconds.

NB. You can hide any columns you don’t want by clicking ‘Select columns’ on the instructions tab. Remember to save your selection and import the data again.

**STEP 4**
At this stage you can edit the custom code columns in any way you like. You can enter custom codes of up to 20 characters, or you can insert formulae to link to the ‘Spare’ tabs we’ve provided (these are completely unprotected, so you can use them how you want e.g. to import data from other systems or use VLOOKUP functions). We’ve protected the rest of the cells to ensure they stay in the correct format.

**STEP 5**
Once you’ve edited the custom code columns, export the spreadsheet using the ‘Export’ button on the instructions tab. You’ll be asked to save the file to your computer as a CSV. You’ll need to make a note of the file name and where you save it. You’re now ready to upload your codes to the Virgin Money Giving database.
Uploading your data

Your exported data is now ready for uploading. Here’s how to do it:

**STEP 1**  
Sign into your charity’s account.

**STEP 2**  
Go to ‘Reporting’ and then ‘Bulk upload for reporting codes’.

**STEP 3**  
Click on ‘Next’.

**STEP 4**  
Click on the browse button to find the CSV file you exported from the spreadsheet. Select the file and then click on the ‘Open’ button.

**STEP 5**  
Now click ‘Upload’. After a few seconds you’ll see how many rows of data have uploaded. If this number is correct, click on ‘Process files’. If you think it’s incorrect, check you selected the correct CSV file and try again.

**STEP 6**  
If no errors are found all your data will then be saved to the Virgin Money Giving database.

If we can’t process any of the data the update process will pause and we’ll tell you the affected rows and why we can’t update them. You’ll be asked if you want to ‘Cancel’ the update (this means none of your data will be saved) or ‘Continue’ processing (this means we’ll update the data we can). Either way you’ll be able to download a CSV file that you can use to fix the records we couldn’t process. You can fix them either by manually allocating the codes or by amending the spreadsheet and extracting another file for uploading.

**STEP 7**  
All details of processed and cancelled uploads can be found by selecting ‘Upload history’ from the ‘Reporting’ menu.
MANUALLY ALLOCATING REPORTING CODES

If you want to import your Virgin Money Giving data into your own charity’s computer systems, it’s a good idea to set up reporting codes to help you match the two sets of data. You can use these fields to hold whatever data you like. To keep things simple, it's best to name the field to match your own system.

For example, if every fundraiser has a reference number in your charity’s system, you could set up a custom field for these reference numbers on Virgin Money Giving too. You can create up to 20 custom fields in the Virgin Money Giving reporting system – five fields each for donors, fundraisers, events and fundraiser pages.

You can assign custom reporting codes to fundraisers, fundraising pages and donors using the ‘custom code bulk upload’ function. However if you only have a few records to assign codes to you can do this manually. Please note custom reporting codes for events can currently only be assigned manually.

Here’s how to manually allocate reporting codes:

**STEP 1**
Sign in to your charity’s account.

**STEP 2**
Go to ‘Reporting’ and then ‘Manually allocate reporting codes’.

**STEP 3**
Select the tab you want to apply codes to – fundraisers, fundraising pages, donors or events. Please note you can only assign codes to donors who’ve registered on Virgin Money Giving.

**STEP 4**
Search for the records you want to update – you can narrow this down by entering search criteria like surname, postcode or date range. You can also choose to see all records or those that don’t currently have codes.

**STEP 5**
Enter or amend the reporting code values for each record returned in the search results. Clicking ‘Next’ or ‘Previous’ saves the data automatically. You can also navigate by entering a page number in the box and clicking ‘Update’. Results appear in alphabetical order based on surname or event name.

The results within the ‘events’ tab include a tickbox alongside each code. If you want all fundraising pages that are subsequently created for this event to be automatically coded with the same event values, simply tick the boxes you want to be applied.

**STEP 6**
Please remember that reporting code changes won’t appear on any of the reports until the following day.
FIND OUT HOW MUCH YOUR FUNDRAISERS HAVE RAISED

Knowing how much your fundraisers have raised means you can personalise your messages to them and tailor the support you offer. For example, you can:

> Contact your fundraisers and their donors to say thanks
> Find out who your top fundraisers are and celebrate their success
> Offer advice and encouragement to fundraisers who are struggling to meet their target

Just follow the steps below to run a report and find out how your fundraisers are getting on.

**STEP 1**
Sign into your charity's account and choose ‘Reporting’ from the menu on the left.

**STEP 2**
A list will appear under ‘Reporting’ – simply click on ‘Reports’.

**STEP 3**
A new window will appear with a menu on the left. Click the ‘+’ symbol next to ‘reporting’, then click the ‘+’ next to ‘standard reporting’.

**STEP 4**
Click ‘donations’ and a list of reports we’ve already set up for you will appear in the centre of the screen. You need the report called ‘Donations by fundraising page’.
Tick the box under ‘Report name’ to select this report, then click the ‘Run’ button. A window will appear called ‘report options’.

**STEP 5**
Use the drop-down list next to ‘Report period’ to choose the time frame you’d like to run the report for, then click ‘OK’. (E.g. If you want to know how much each page has raised so far this year, choose ‘current year’.)

**STEP 6**
Your report will show on screen with the following details:
> Event name
> Fundraiser’s name
> Name of each donor
> Address of each donor
> Donation details
> Marketing permissions (if donors are happy for your charity to contact them or not)

By clicking one of the 3 symbols at the top right of the screen above ‘standard reports’, you can convert your report to a PDF file, Word document or SWF file, ready to save or print.
FIND OUT YOUR FUNDRAISERS’ CONTACT DETAILS

Easy access to your fundraisers’ contact details can help your charity stay in touch with your supporters. For example, you can:

- Send your fundraisers information about your charity and events
- Share tips with your fundraisers to help boost the amounts they raise
- Ask your fundraisers for feedback and case studies you can use to promote your cause
- Tell fundraisers how to raise money as a team and get others involved

Just follow the steps below to run a report and find out the names, addresses and phone numbers of people fundraising for your charity through Virgin Money Giving.

STEP 1
Sign into your charity’s account and choose ‘Reporting’ from the menu on the left.

STEP 2
A list will appear under ‘Reporting’ – simply click on ‘Reports’.

STEP 3
A new window will appear with a menu on the left. Click the ‘+’ symbol next to ‘reporting’, then click the ‘+’ next to ‘standard reporting’.

STEP 4
Click ‘fundraising pages’ and a list of reports we’ve already set up for you will appear in the centre of the screen. You need the report called ‘New fundraising pages’.

Tick the box under ‘Report name’ to select this report, then click the ‘Run’ button. A window will appear called ‘report options’.

STEP 5
Use the drop-down list next to ‘Report period’ to choose the time frame you’d like to run the report for, then click ‘OK’. (E.g. if you want to know the contact details for all the fundraisers who have set up Virgin Money Giving pages for your charity this month, choose ‘current month’.)

STEP 6
Your report will show on screen with the following details:

- Event name
- Fundraiser’s name
- Fundraiser’s address
- Fundraiser’s contact phone number
- Fundraising target
- Total amount raised

By clicking one of the 3 symbols at the top right of the screen above ‘standard reports’, you can convert your report to a PDF file, Word document or SWF file, ready to save or print.

Our reporting tool works best with Internet Explorer 7 or higher, or Firefox 3 or higher. You can find out which browser version you are using by clicking ‘Help’ on the toolbar at the top of your browser and then ‘About Internet Explorer’ or ‘About Firefox’.

To upgrade your browser use the links below or speak to your IT department. Update Internet Explorer. Update Firefox.
FIND OUT HOW MANY PAGES HAVE BEEN SET UP FOR YOUR EVENTS

Knowing how many people have set up a Virgin Money Giving page for your charity’s events can help you plan promotional activities. For example, you can:

> Send fundraisers branded bibs to wear at events
> Thank fundraisers for signing up and taking part in your events
> Ask your fundraisers to promote your events and spread the word

Just follow the steps below to run a report and find out how many fundraisers are getting involved in your events.

**STEP 1**
Sign into your charity’s account and choose ‘Reporting’ from the menu on the left. A list will appear under ‘Reporting’ – simply click on ‘Reports’.

**STEP 2**
A new window will appear with a menu on the left. Click the ‘+’ symbol next ‘reporting’, then click the ‘+’ next to ‘flexible reporting’.

**STEP 3**
Click ‘fundraising pages’ and a list of reports will appear in the centre of the screen. You need the report called ‘Fundraising pages’.

Tick the box under ‘Report name’ to select this report, then click the ‘Edit’ button – a screen with lots of empty columns will appear.

**STEP 4**
Simply scroll across the screen to find the column called ‘event name’. Click the column heading and a list of options will appear – choose ‘Remove from table’.

**STEP 5**
In the ‘Available fields’ box on the left you’ll find the ‘event name’ column header you just removed. Click on ‘event name’ and drag it to the box which says ‘Drag a data field here to group the report’.

**STEP 6**
Next, click the ‘run’ symbol on the top left. A window will appear called ‘report options’. Use the drop-down list next to ‘Report period’ to choose the time frame you’d like to run the report for, then click ‘OK’. (E.g. If you want to know how many pages were set up for your charity’s events last year, choose ‘previous year’.)

**STEP 7**
Your report will show on screen with each of your charity’s events and the pages set up for them. By clicking one of the 2 symbols at the top right of the screen above ‘flexible reports’, you can convert your report to a spreadsheet, ready to save or print.
PAYMENTS INTO YOUR BANK ACCOUNT

Knowing exactly how much is being paid into your charity’s account, and what the payments are for, makes it easier to keep track of and reconcile your accounts. This report gives you a full breakdown of the money being transferred. Here’s how to run the report:

**STEP 1**
Sign into your charity’s account and choose ‘Reporting’ from the menu on the left.

**STEP 2**
A list will appear under ‘Reporting’ – simply click on ‘Reports’.

**STEP 3**
A new window will appear with a menu on the left. Click the ‘+’ symbol next to ‘Reporting’, then click the ‘+’ next to ‘Standard reporting’.

**STEP 4**
Click ‘Payments’ and a list of reports we’ve already set up for you will appear in the centre of the screen. You need the report called ‘Statement summary’.
Tick the box under ‘Report name’ to select this report, then click the ‘Run’ button. A window will appear called ‘Report options’.

**STEP 5**
Use the drop-down list next to ‘Report period’ to choose the time frame you’d like to run the report for, then click ‘OK’. (For example, if you want to know how much will be paid to you this week, choose ‘Current week’.)

**STEP 6**
Your report will show on screen with the following details:

- Transaction type (e.g. website donations, Gift Aid).
- Number of transactions.
- Gross amount.
- Transaction fee. (Deduction)
- VAT on transaction fee. (Deduction)
- Card fee. (Deduction)
- VAT on card fee. (Deduction)
- Payment to charity.

By clicking one of the 3 symbols at the top right of the screen above ‘Standard reports’, you can convert your report to a PDF file, Word document or SWF file, ready to save or print.
BREAKDOWN OF INDIVIDUAL DONATIONS

This report takes a detailed look at all the donations you receive, whether they’re paid direct to your charity or through a fundraiser’s page. It’s a quick and easy way to keep track of your charity’s fundraising activity. Here’s how to run the report:

STEP 1
Sign into your charity’s account and choose ‘Reporting’ from the menu on the left. A list will appear under ‘Reporting’ – simply click on ‘Reports’.

STEP 2
A new window will appear with a menu on the left. Click the ‘+’ symbol next to ‘Reporting’, then click the ‘+’ next to ‘Flexible reporting’.

STEP 3
Click ‘Payments’ and a list of reports will appear in the centre of the screen. You need the report called ‘Payments donations’.

STEP 4
If you want to see how each event is doing, it’s easy to group the report so it shows each event separately. Just click on the ‘Event name’ column header (near the end of the grey bar in the centre of the screen) then click on ‘Remove from Table’.

The ‘Event name’ column heading will now move into the ‘Available fields’ box on the left. Just click on ‘Event name’ and drag it to the box which says ‘Drag a data field here to group the report’.

STEP 5
Now the report has been edited, you can save it this way so you don’t have to edit it again. To do this, just click on the ‘Save’ icon on the top left.

Next, click the ‘run’ button on the top left. A window will appear called ‘Report options’. Use the drop-down list next to ‘Report period’ to choose the time frame you’d like to run the report for, then click ‘OK’. (For example, if you want to know how this week’s payment breaks down, choose ‘Current week’.)

STEP 6
Your report will show on screen with each of the donations, along with full details of the individual fundraisers and donors.

By clicking one of the 2 symbols at the top right of the screen above ‘Flexible reports’, you can convert your report to a spreadsheet, ready to save or print.

Matching Gift Aid payments to donations

If you’ve run the Standard Statement Summary and it shows that the payment includes Gift Aid, just follow the steps above but select the ‘Payment Gift Aid’ report instead of ‘Payments donations’ in step 3. This will give you details of which donations the Gift Aid payments relate to.
SETTING UP YOUR EMAIL ALERTS

We know you like to stay in touch, but we don’t want to bombard you with too much information. By setting up emails alerts you control the updates your charity receives.

You can choose to get alerts about fundraisers, donors and the amount and frequency of donations. We can also let you know when we’ve paid donations and Gift Aid into your charity’s bank account.

**STEP 1**
Sign into your charity's account and choose ‘email alerts’.

**STEP 2**
Tick the boxes next to the alerts you’d like to receive. Some alerts can be customised to suit your charity. For example if you want to get an email when you receive a large donation, you decide how much is classed as a ‘large’ amount.

**STEP 3**
Tick the boxes next to the names of the people who would like to receive the alerts (you’ll need to pick at least one person).

**STEP 4**
Click ‘save’ when you’re happy with your alert choices. You can sign in and change your alerts whenever you like, just make sure you save them each time.

**STEP 5**
Your alert emails will be sent from theteam@virginmoneygiving.com - it’s a good idea to add this to your email address book so our alerts don’t get caught in your spam filter.
DONATION AND GIFT AID PAYMENTS TO CHARITIES

Donations
Here’s a breakdown of how we collect donations and how long it takes to process them:

**STEP 1**
Donations can be made through Virgin Money Giving 24 hours a day, 365 days a year.

**STEP 2**
It takes 4 working days for a donation to reach us from a donor's bank or credit card account (or 5 days if they pay by American Express).

**STEP 3**
We take off our 2% transaction fee and deduct any card fees, then once a week we pay all the donations we’ve received to your charity using BACS.

**STEP 4**
BACS takes around 2 days to clear.

We collect and pay out all donations in this way, whether they’re direct donations or donations made by sponsoring a fundraiser. This also includes any event fees your charity has chosen to collect with Virgin Money Giving.
Gift Aid

It takes 6-8 weeks to reclaim Gift Aid from HMRC. We reclaim it automatically on behalf of charities, then pay it to you in full once a month.

Important information

- All payments will show on your charity’s bank statements as ‘Virgin Money Giving’.
- You can run a report at any time to get detailed financial information for your charity (for example, how many donations you’ve received in the last month).
- See full details of our fees and how we compare with other fundraising websites.
- Remember, your charity can have more than one bank account registered with us so you choose where we pay donations, Gift Aid and event fees.

SETTING UP YOUR OWN EVENT

You can set up an event all in one go, or you can save it and come back later. The event won’t appear on Virgin Money Giving until you’re finished and ready to tell fundraisers about it.

To save an event at any time just click the button at the bottom right of the screen.

STEP 1
Type in the basic information about your event:

- The event name, start date and time.
- The type of event – you can choose as many options as you like.
- The location. If there’s more than one location, please choose the main one or set up an event for each location.
- Choose the bank account you’d like donations paid into. You can always add a new bank account if you’d like.
- Tell us when you’d like the event to appear on Virgin Money Giving.

Click ‘next’.

STEP 2
You can now add a bit more detail about your event:

- A description of the event and some details about how to take part. This information will be shown on the event page.
- Add a logo – click ‘browse’ to find the file on your computer.
- Fill in the contact details. These will be shown on the event page so they’re handy for fundraisers or sponsors who’d like to get in touch.

Click ‘next’.
STEP 3

If you want us to collect event fees, you'll now need to give details of those fees, and the charity the event is being held in aid of. You have three options to choose from – please note if your event is being held in aid of several charities we won’t be able to collect the event fees for you:

The event is just for your charity, and you don’t want Virgin Money Giving to collect event fees.

> Answer ‘no’ to the question ‘Would you like us to collect your fee payments for you?’
> Answer ‘yes’ to the question ‘Is this event just for your charity?’
> Click ‘next’ to choose who will manage the event.

The event is just for your charity, and you’d like Virgin Money Giving to collect event fees. Read our guide to collecting event fees.

The event is for more than one charity, and you don’t want Virgin Money Giving to collect event fees.

Read our guide to splitting donations between different charities.
JOINING AN EXISTING EVENT

Many of the big events which are open to every charity will already be set up on Virgin Money Giving (e.g. the Virgin Money London Marathon). Here’s how you can add your charity to the event to show you’re joining in.

**STEP 1**
Search for the event you’d like to join – type the name in the search box, then click ‘find event’.

**STEP 2**
Look through the search results, clicking on ‘next’ or ‘previous’ to move through the pages. When you find the event you’re looking for, just click on it.

**STEP 3**
Please choose the bank account you’d like donations from this event paid into. You can always add a new bank account if you’d like.

**STEP 4**
Click ‘next’. All of the event information will appear in the boxes. You can now choose who will manage the event.
ADDING A NEW EVENT

You can add a fundraising event to Virgin Money Giving whenever you like – for each event we’ll add a page to your charity’s Virgin Money Giving page with all the details.

Here are some of the things you can do when setting up an event:

Collect event fees online
Event entry fees are collected from fundraisers and paid into a bank account of your choice (please note there will be a small handling fee).

You can charge several different fees for the same event if you need to (e.g. an adult fee, child’s fee, student fee).

Choose a bank account
If you use different accounts for different events, just tell us and we’ll make sure the money goes to the right place.

Decide the number of people who can take part
If there’s a restriction on numbers, we can keep track and stop new fundraisers joining once your limit has been reached.

Set up events just for your charity
When an event is just for your charity, we can prevent fundraisers from signing up to your event in support of a different charity.

Set up an event in partnership with another charity
As long as all the charities are registered with Virgin Money Giving, you can create an event for up to five charities. If you’ve agreed a percentage split, we can distribute the donations for you.

Choose account users to update your events
If there are a number of staff at your charity working on events, you can choose who manages each event.

Add your charity to big events
We’ll add big events open to all charities to Virgin Money Giving (e.g. the London Marathon). You can then simply add the event to your charity’s page.

Now you know the benefits, here’s how to add your charity’s event:

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Choose ‘events’ and then ‘set up an event’.

**STEP 3**
Click on the ‘get started’ button in the centre of the screen.

**STEP 4**
Please choose whether you’re ‘setting up your own event’ or ‘joining an existing event’ that’s already been set up on Virgin Money Giving. The screen will change depending on your choice. If you’re not sure if the event has already been registered with us, search for it – it could save you time.
CANCELLING AN EVENT

You can cancel an event on Virgin Money Giving at any time, but if any fundraisers have already signed up you’ll need to contact them to let them know.

STEP 1
Sign into your charity’s account.

STEP 2
Choose ‘events’ and then ‘update events’.

STEP 3
All of the events your charity has set up on Virgin Money Giving will be shown. You can sort through this list by clicking in the boxes, or by using the dropdown menu and clicking ‘show events’.

STEP 4
Click next to the event you need to cancel and then click on the ‘cancel event’ button at the bottom right of the screen. You’ll be asked to confirm that you really do want to delete the event. Once an event has been cancelled it can’t be undone – you’d need to add it again as a brand new event.

STEP 5
The event will be removed from Virgin Money Giving straightaway, and no new fundraisers will be able to join. You can run a report to find the details of fundraisers who’ve already signed up through Virgin Money Giving.

CHOOSING WHO WILL MANAGE AN EVENT

The last thing you’ll need to do when you add an event to Virgin Money Giving is decide who at your charity will manage and update the event.

After you’ve set up your event and typed in all the details, follow these steps:

STEP 1
On the ‘account users’ screen, you’ll see a list of all the people at your charity who have access to ‘events’ in your charity’s Virgin Money Giving account. Tick the boxes next to the people you’d like to be able to update this event.

If you’d like to add a new person as an account user, see our guides to adding account users or managing access to your charity’s account.

STEP 2
Click ‘set up event’ to finish.
COLLECTING EVENT FEES

If you’d like, we can collect event fees for you when fundraisers sign up to your event. To do this, the event must be yours alone - it can’t be organised in aid of other charities too.

Please note we apply our 2% transaction fee when collecting event fees - this is simply to cover our running costs.

**STEP 1**

When setting up your event on Virgin Money Giving answer *yes* to the question *Would you like us to collect your event fees for you?*, and choose the bank account you’d like these event fees paid into. You can always add a new bank account if you’d like.

**STEP 2**

Fill in the boxes with details of how to sign up for the event, and what the fee is for each group of people (e.g. an adult fee, student fee, child’s fee).

**STEP 3**

When you’ve finished, click *next* to choose who will manage the event.

SPLITTING DONATIONS BETWEEN DIFFERENT CHARITIES

If your event is held in aid of more than one charity, we can help you manage the number of charities that take part, and split the donations between them.

**STEP 1**

When setting up your event on Virgin Money Giving, answer *no* to the question *Would you like us to collect your fee payments for you?*, then answer *no* to *Is this event just for your charity?*

**STEP 2**

Choose which charities your event is open to:

> If your event is open to any charity, the fundraisers will be able to support any charity registered with Virgin Money Giving.

> If your event is only for certain charities, please tell us which ones. Type the charities’ names into the box, pick them from the list and then click *add*. You can add up to five charities.

**STEP 3**

If donations are to be split between the charities, please type in the percentage you’d like each charity to receive and we’ll divide the donations up accordingly.
CREATING A DEEP LINK TO YOUR EVENT

You can create direct links to charity events you’ve listed on Virgin Money Giving and add them to your own website and any emails. This will make it quicker and easier for fundraisers to set up pages for your event by pre-filling all of the event details for them.

To create a deep link simply follow the steps below.

**STEP 1**
Sign into your charity's account and make a note of your 'Account ID' number which you’ll find in the top right of the page.

Write it as: charityId=

For example: charityId=456
(Please note upper case ‘I’ only)

**STEP 2**
Click on ‘Events’ in the left menu and then click ‘Update event’.

**STEP 3**
Make a note of your 'Event ID' number – it’s in the last column of the event you’d like to link to.

Write it as: eventId=

For example: eventId=123
(Please note upper case ‘I’ only)

**STEP 4**
To create a deep link, simply use this address:
http://uk.virginmoneygiving.com/fundraiser-web/fundraiser/fundraiserEventsDeepLink.action?

Then on the end of it add:
(your event ID)&(your charity ID)

So it should look like this:
http://uk.virginmoneygiving.com/fundraiser-web/fundraiser/fundraiserEventsDeepLink.action?eventId=123&charityId=456

That’s it.
**UPDATING AN EVENT**

You can change or update an event on Virgin Money Giving at any time. Please note if any important details change, you may need to contact the fundraisers who’ve already signed up.

**STEP 1**  
Sign into your charity’s account.

**STEP 2**  
Choose ‘events’ and then ‘update events’.

**STEP 3**  
All of the events your charity has set up will be shown. You can sort through this list by clicking in the boxes, or by using the dropdown menu and clicking ‘show events’.

**STEP 4**  
Pick the event you’d like to update, and click ‘view details’. All of the information you’ve given us will be displayed – you can work through and change whatever you need to.

**STEP 5**  
When you’ve finished making changes, click ‘save’. The event will be updated on Virgin Money Giving straightaway. If you need to get in touch with any fundraisers, you can run a report to find their details.

**CHANGING YOUR REGISTERED ADDRESS**

Here’s how to change your charity’s registered address:

**STEP 1**  
Sign into your charity’s account.

**STEP 2**  
Go to ‘update account’ and then ‘registered address’.

**STEP 3**  
The registered address we currently have for you will show on the screen - simply click ‘change address’ and type in your changes.

**STEP 4**  
Click ‘save’ when you’re happy and we’ll update your charity’s details right away.
CHANGING YOUR ADMINISTRATION ADDRESS

We use this address whenever we send you anything in the post. Here’s what to do if you need to change your charity’s administration address:

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Go to ‘update account’ and then ‘administration address’.

**STEP 3**
The administration address we currently hold will be shown on screen, along with your charity’s registered address.

**STEP 4**
If you need to change the administration address, click ‘change address’ and type in the new address details.

If your administration address is the same as your registered address, just tick the box to let us know.

**STEP 5**
Click ‘save’ to finish – we’ll update your charity’s details right away.
ADD A BANK ACCOUNT

You can add a new bank account to your charity’s Virgin Money Giving account whenever you like. Here’s how:

**STEP 1**
Download a bank account form, fill it in and post it back to us at the address below.

Please include a bank statement for the account you’re adding. This statement needs to be an original rather than a photocopy and dated within the last 3 months.

Virgin Money Giving  
28 St Andrews Square  
Edinburgh  
EH2 1AF

**STEP 2**
When we’ve finished our checks we’ll post your statement back and the bank account will be set up on Virgin Money Giving ready for you to use.

**STEP 3**
When you sign into your charity’s Virgin Money Giving account you can decide how you’d like to use the bank account (e.g. as the account your donations are paid into or to collect fees for a fundraising event).

Find out how to do this with our guide to managing your charity’s bank accounts.
MANAGING YOUR CHARITY’S BANK ACCOUNTS

You can make changes to the bank accounts you’ve got registered with us whenever you like.

See which accounts you’ve got registered with us

**STEP 1**
Sign into your charity’s account.

**STEP 2**
Choose ‘update account’ and then ‘bank account details’.

**STEP 3**
You’ll see details of the accounts you’ve got registered with us.

Change your default account

**Step 1**
Sign into your charity’s account. Choose ‘update account’ and then ‘bank account details’.

**STEP 2**
Next to ‘accounts you’ve registered’, choose the account you’d like to use as your default account.

**STEP 3**
Click on ‘make this my default account’ to finish.
Add an account

If you’d like to register a new bank account with Virgin Money Giving, you’ll need to fill out a form and send it back to us.

Remove an account

Before you remove an account, please note:

› You can’t remove an account if it’s set as your default account - please change the default account first.
› You can’t remove an account which is being used to collect fees for a fundraising event. You’ll need to update the event and change the account first.
› You’ll need to have at least one account registered with us.

**STEP 1**
To remove an account, please call us on **03456 01 10 45** and let us know the details.

**STEP 2**
We may have to wait before we can remove the account (for example, if we’re waiting for donations to clear) so we’ll give you a call to let you know when it’s done.
CHANGING YOUR CHARITY’S LOGO

Your logo will be shown on your charity’s page, in search results and on fundraisers’ pages when they choose to support you. Here’s what to do if you’d like to change your logo:

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘update account’ and then ‘charity logo’.

STEP 3
Your current logo will be shown. To choose a different image, click ‘browse’ and find the file on your computer.

STEP 4
When you’ve found the file you’re after, click the ‘upload’ button.

STEP 5
Once the image has been uploaded, you’ll see it as it will appear on Virgin Money Giving. If you need to change the logo again, simply repeat step 3 to pick a different file. When you’re happy with the new logo, click ‘save’ and we’ll start using it right away.

About logo image files

- We need to resize all logos so they fit on our pages - this space is 170 pixels wide and 100 pixels high.
- You can upload your logo as a jpeg, bmp or gif file.
- The maximum file size is 1Mb.
CHANGING YOUR CHARITY’S COLOUR

Your chosen colour will be used for the header, footer, navigation and where your charity’s name appears on your pages. Here’s what to do if you’d like to change your colour theme:

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘update account’ and then ‘charity colour’.

STEP 3
You can change your current colour using the chart or by entering the exact colour values directly. For example the hexadecimal colour code for Virgin red is #CC0000

STEP 4
There is a preview panel which enables you to see what your page will look like whilst choosing your colour.

STEP 5
When you’re happy with the new colour, click ‘save’. Your charity’s pages will then be updated.

CHANGING YOUR CHARITY’S DESCRIPTION

Your ‘charity description’ is a brief summary of the work your charity does and the causes you support. It appears in search results next to your charity’s logo and on fundraisers’ pages when they’ve chosen to raise money for you. Here’s how to change the description:

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘update account’ and then ‘charity description’.

STEP 3
The current description will appear on screen - simply type your changes in the box. When you’re happy with your new description, click ‘save’ and we’ll update it right away.

If you make some changes but then decide you preferred the description as it was, just exit the page without clicking ‘save’.

If you’d like to add more information about your charity to Virgin Money Giving, you can add more pages with text, photos and links whenever you like.
UPDATING YOUR CHARITY’S DETAILS

When charities register with us, we ask for some contact details and basic information so visitors to Virgin Money Giving know where to go if they’d like to find out more. You can update your charity’s details whenever you like:

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘update account’ and then ‘charity details’.

STEP 3
You’ll see the information we currently hold about your charity. Just click in the boxes you need to update and type in the new details.

STEP 4
When you’re happy click ‘save’ and we’ll update your charity’s details right away.

CHANGING YOUR CHARITY CATEGORY

We list all the charities on Virgin Money Giving under categories, so fundraisers and donors can find charities by looking up the good causes they work with.

If you’d like to change your charity’s categories, here’s how:

STEP 1
Sign into your charity’s account.

STEP 2
Go to ‘update account’ and choose ‘charity category’.

STEP 3
Tick the boxes next to the categories you’d like to be listed under. If your charity is listed in a category and you’d like to be removed from it, simply click the box again to remove the tick.

STEP 4
When you’re happy, click ‘save’.