

### January Extended Hours (Eastern)

Monday - Thursday 9 am - 7 pm  
Friday - 9 am - 5 pm  
Saturday - 11 am - 2 pm

### Regular Hours (Eastern)

Monday - Friday 9 am - 5 pm

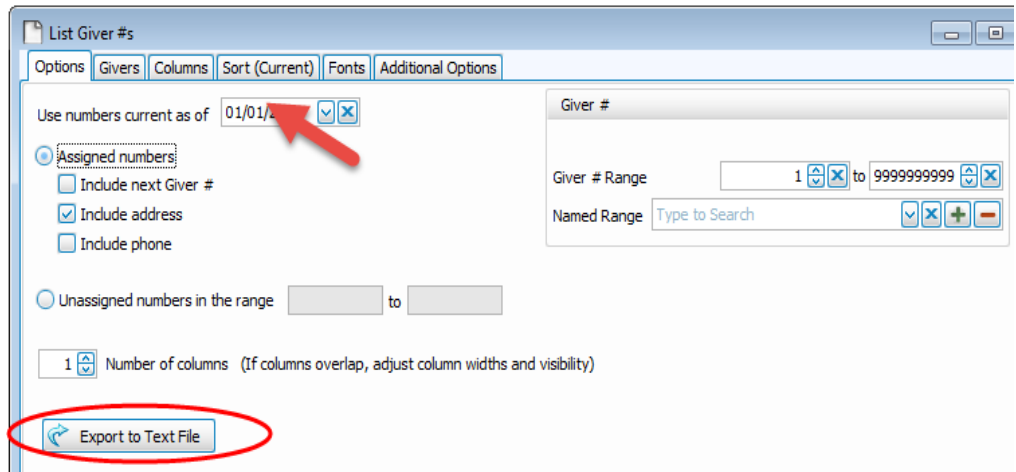
### Support & Office Closed

Thanksgiving - November 28th & 29th  
Christmas - December 25th  
New Years - January 1st

## OPTION #1 – All Giver # Export for Envelope Company

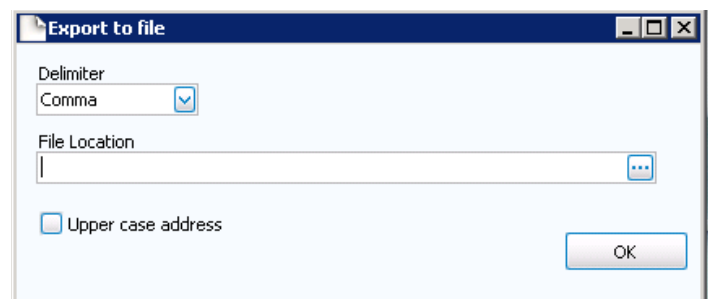
Use these instructions if you have ended Giver #s for terminated and/or deceased persons and do not need to filter your criteria more than simply those with Giver #s.

- *Donations>Report/Export>Lists & Labels>List Giver #s*
- Fill in the date at 'Use numbers current as of'. If you are creating envelopes as of the new year, use 01/01/XXXX as your date.
- Click on *Assigned numbers>Include address*
- Perhaps you want to set your *Giver # Range*
- On the *Givers* tab, check *Donation Individual Givers & Donation Group Givers*
- On the *Columns* tab, choose *Giver Name* and *Current #*
- On the *Options* tab, click on *Export to Text File*



- On the *Export to file* screen

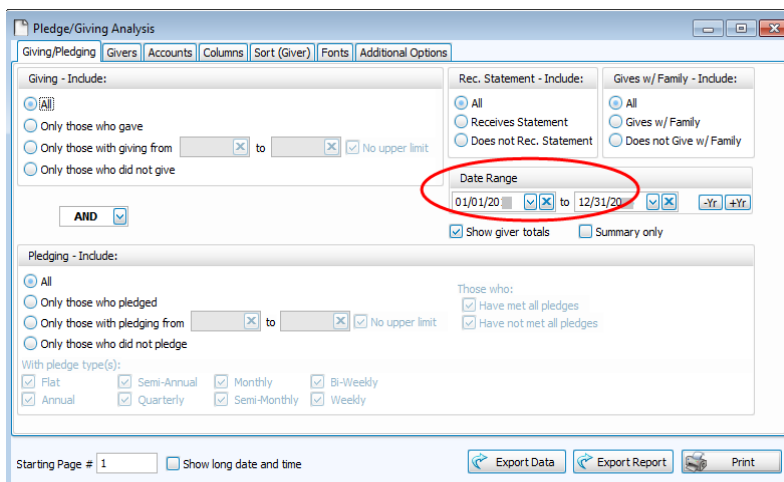
- Delimiter stays at Comma
- File location may be set by clicking on the *Browser box (the three dots at the end of the field)*
- On *Save As* choose where you would like to save the file. Click *Save*.
- The file name will appear as *GiverNumberList.csv*
- Click *OK*
- A box will appear indicating where the file was saved. and if you would like to open it. Click *Yes*.
- ◆ List of files appear.
- Send the *GiverNumberList.csv* to the Envelope Company.



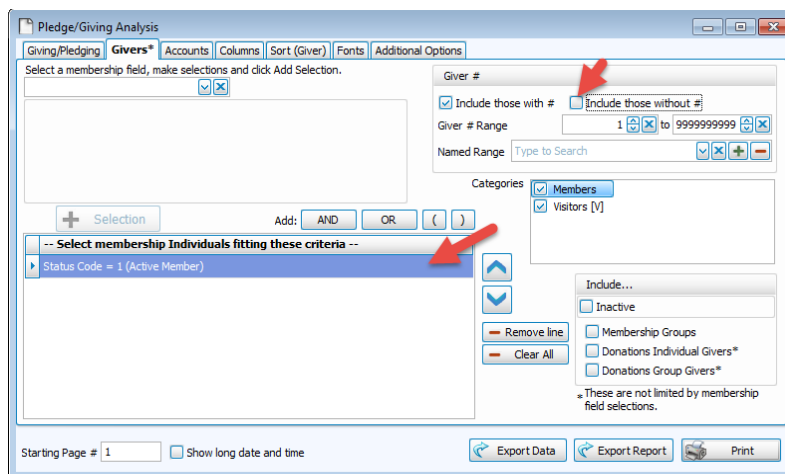
## OPTION #2 – Limiting Giver # Export for Envelope Company

If your export is limited to persons with Status of Active, for example...

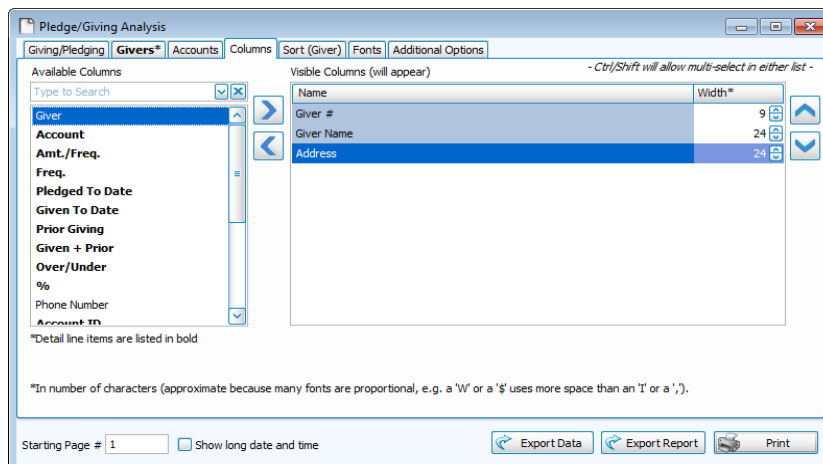
- Donations>Report/Export>Compare & Analyze> Pledge/Giving Analysis
- On the Giving/Pledging tab, if preparing for a new year
  - Edit Date Range to 01/01/XXXX to 12/31/XXXX (new year date range)
  - Giving – Include: choose All, Pledging – Include: All
  - If a weekly or monthly Export is done, adjust criteria accordingly



- On the Givers tab, under *Select a membership field, make selections and click Add Selection.*
  - Use the dropdown to select the Status field
  - Set the selection criteria of Active
  - Click on the + Selection
  - Check Visitors
  - Perhaps, check 'Select those with #' and uncheck 'Select those without #'
  - If applicable, uncheck boxes under 'Include...'



- On the *Columns* tab
  - Under *Visible Columns*, choose *Giver #*, *Giver Name* and *Address*



- Click on *Export Data*
  - On the *Export to file* box
  - Delimiter stays at *Comma*
  - File location may be set by clicking on the *Browser box* (the three dots at the end of the field)
  - On *Save As* choose where you would like to save the file
  - The file name will appear as *PledgeGiving.csv* (if you wish you may change the file name to *Giver-NumberList.csv*)
  - Click *Save* and click *OK*
  - A box will appear indicating where the file was saved and if you would like to open it.
  - Send the file to the Envelope Company.

