Preparing Network for Good Sheets for Import

Includes CrowdRise Reports For:

PIH Engage (Fy17+)

1. Download Donation Reports
2. Network for Good
   1. Log in to <https://www.networkforgood.org/npo/MyAccount/Login.aspx>
   2. Under the Reports header, click **Donation Tracking**
   3. Select start and end dates for the *month prior* to the check date and click **Enter**
   4. Near the upper left, click **Export** hyperlink.
   5. This will download a DownloadReport.csv. Rename this to NFG\_Donations\_<month and year>.csv
3. CrowdRise
   1. Log in to <https://www.crowdrise.com/>
   2. In upper left, click icon dropdown menu, select **Report Center**
   3. Select a Report Type: Donation Report, Date Range: Custom (match dates to NFG report)
   4. **RUN** **REPORT**
   5. After page refreshes, click **EXPORT REPORT**
4. Starting in the Network for Good workbook (originally titled DownloadReport):
5. Delete blank rows
6. Sort by Source Website, and scroll to the CrowdRise donations.
7. Pull out all of the CrowdRise gifts, and put them in a separate (CrowdRise) worksheet in this workbook.
   1. In CrowdRise worksheet, subtract NPO Fees column from Donation Amount column (ignoring Donor Fees column). Find sum of this new amount (Net Donation).
8. Back in the primary worksheet, replace the dates in the donation date column with the process date (this will be the gift date).
9. Remember to delete summation rows at bottom before importing.
10. This sheet is now ready for IOM (Network for Good).
11. Open the CrowdRise workbook:
12. Sort by column Payment Processor. Delete all marked Not Donated Through CrowdRise
13. Find sum of Net Donation column. Should be equal to calculated net donation total in CrowdRise worksheet in NFG work book (I.2.a.)
14. Add two columns on the end for Check Date and Check Number, copied from NFG sheet Payment Date and Payment Via columns
15. Replace date in Transaction Date column with process date from NFG check
16. Remember to delete summation rows at bottom before importing.
17. Now ready for IOM (CrowdRise: PIH Engage).