

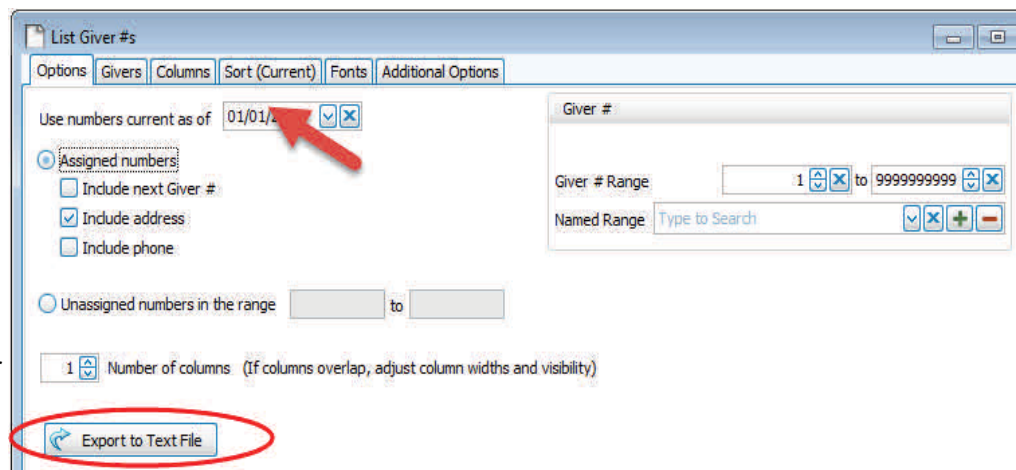
**Hours of Operation: (Eastern)**  
**Monday - Thursday 9 am - 6 pm**  
**Friday 9 am - 5 pm**  
**January Extended Hours:**  
**Monday - Thursday 9 am - 8 pm**  
**Friday 9 am - 5 pm**  
**Saturday 10 am - 1 pm**

**Support Lines & Offices Closed:**  
**Thanksgiving – November 22nd & 23rd**  
**Christmas Eve & Day – December 24th & 25th**  
**New Years Day – 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 *Columns* tab, choose Giver Name and Current #
- On the *Options* tab, click on *Export Text to File*



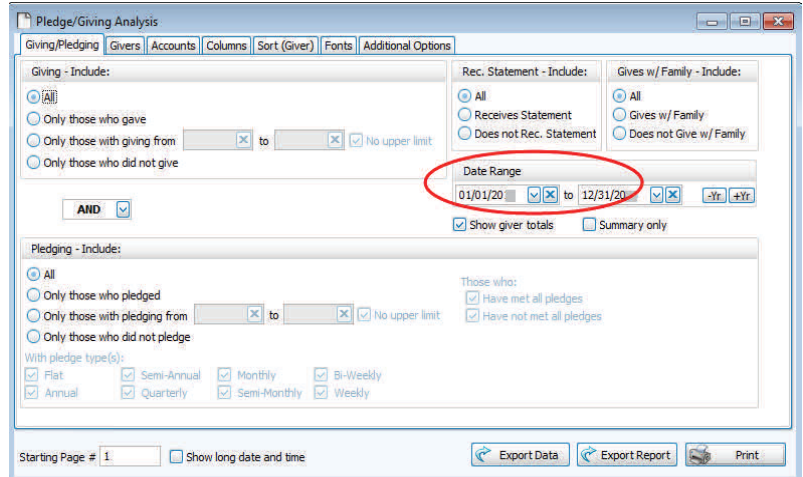
- On the *Export to file* box
  - Delimiter stays at Comma
  - File location may be set by clicking on the *Browser box (the three dots at the end of the field)*
  - On *Save As* choose where you would like to save the file
  - The file name will appear as *GiverNumberList.csv*
  - Click *Save* and click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



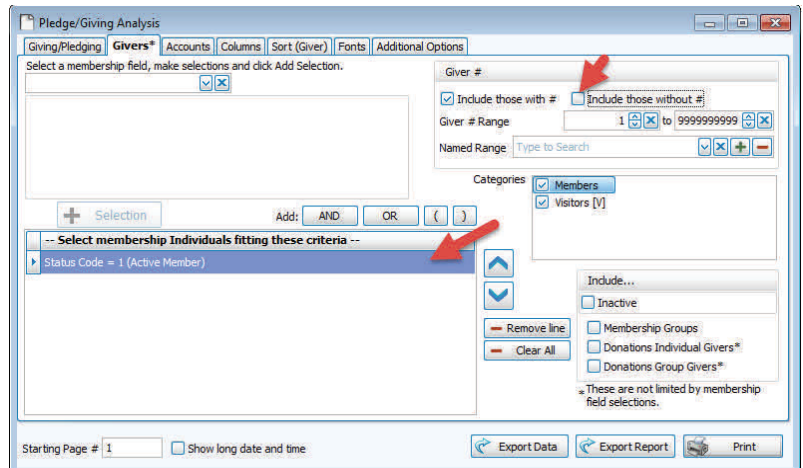
## OPTION #2 – Limiting Giver # Export for Envelope Company

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

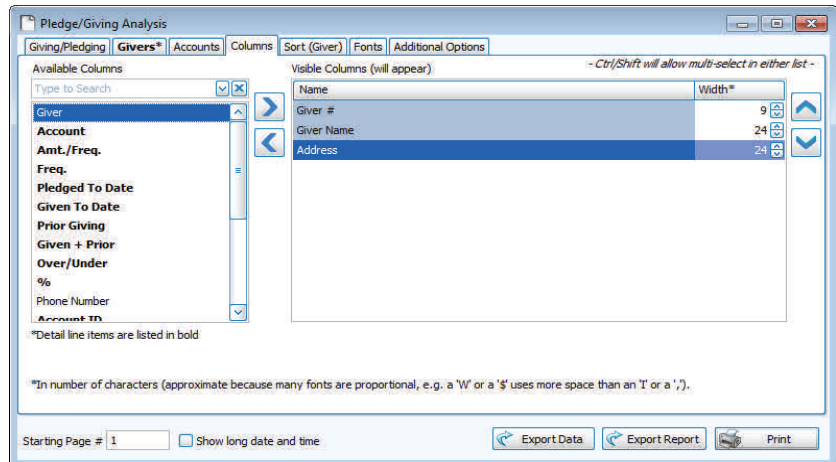
- *Donations>Report/Export>Compare & Analyze>Pledge/Giving Analysis*
- On the *Giving/Pledging* tab, if preparing for a new year
  - Edit Date Range to 01/01/XXXX to 12/31/XXXX (new year date range)
  - Giving – Include: choose *All*, Pledging – Include: *All*
  - If a weekly or monthly Export is done,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

