

VESTRY

FOR THE TREASURER

Giving & Gift Aid Guide

Recording gifts, funds, Gift Aid claims, donor statements and budgets.

Screens from the live demo, "St Aidan's Parish" · demo.vestry.shire-tech.co.uk

GIVING

Recording gifts & funds

The **Giving** page is your gift book. Record a gift — one-off or regular, by card, cash, envelope or standing order — against the right **fund**, and tick Gift Aid where the donor has declared it. Fund cards show progress towards any target you set.

Online gifts from your public Give page arrive here marked 'pending' for you to confirm against the bank.

How it connects

- Public **Give** page donations land here to confirm.
- Totals roll up into **Finance** and into year-end statements.

Vestry
St Aidan's Parish (Demo)

OVERVIEW

- Dashboard

SCHEDULING

- Calendar
- Bookings
- Rotas
- Events

EXTERNAL CONTACTS

- External contacts

WORSHIP

- Songs & CCLI
- Sermons
- Service planner

PEOPLE & CARE

- Contacts
- Households
- Follow-up
- Groups
- Attendance
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guest@demo Sign out

Giving & Funds

St Aidan's Parish (Demo)

You're exploring a live demo of Vestry — try anything you like; the sample data resets every few minutes. [Get Vestry for your church...](#)

Giving statements Export Gift Aid (CSV) Payment providers View public page

£1,465.00

Received (32)

£300.00

Est. Gift Aid (25%)

1

Pending online

3

Funds

Record a gift

Amount (£) Method Card

Fund — general —

Giver Email

Gift Aid eligible

Address (for Gift Aid) Postcode

Record gift

Funds

New fund Target (£) Add

Building fund Add

General fund £1,200.00 / £42,000

3% of target

Missions £15.00 / £8,000

0% of target

Roof appeal £250.00 / £30,000

1% of target

Recent gifts

WHEN	GIVER	FUND	METHOD	AMOUNT	GIFT AID	STATUS
14 Jun	Margaret Hartley	General fund	STANDING_ORDER	£40.00	✓	COMPLETED
14 Jun	Geoff Hartley	General fund	STANDING_ORDER	£25.00	✓	COMPLETED
14 Jun	Ravi Patel	General fund	STANDING_ORDER	£75.00	✓	COMPLETED
14 Jun	Eleanor Voss	General fund	STANDING_ORDER	£30.00	✓	COMPLETED
14 Jun	Chidi Okonkwo	General fund	STANDING_ORDER	£50.00	✓	COMPLETED
14 Jun	Grace Owusu	General fund	STANDING_ORDER	£20.00	✓	COMPLETED
13 Jun	Daniel Marsh	General fund	CARD	£50.00	✓	PENDING
12 Jun	Plate collection	Missions	CASH	£15.00	—	COMPLETED
5 Jun	Anonymous	Roof appeal	CARD	£250.00	—	COMPLETED
14 May	Eleanor Voss	General fund	STANDING_ORDER	£30.00	✓	COMPLETED
14 May	Chidi Okonkwo	General fund	STANDING_ORDER	£50.00	✓	COMPLETED
14 May	Grace Owusu	General fund	STANDING_ORDER	£20.00	✓	COMPLETED
14 May	Geoff Hartley	General fund	STANDING_ORDER	£25.00	✓	COMPLETED
14 May	Ravi Patel	General fund	STANDING_ORDER	£75.00	✓	COMPLETED
14 May	Margaret Hartley	General fund	STANDING_ORDER	£40.00	✓	COMPLETED
14 Apr	Eleanor Voss	General fund	STANDING_ORDER	£30.00	✓	COMPLETED
14 Apr	Chidi Okonkwo	General fund	STANDING_ORDER	£50.00	✓	COMPLETED
14 Apr	Grace Owusu	General fund	STANDING_ORDER	£20.00	✓	COMPLETED
14 Apr	Geoff Hartley	General fund	STANDING_ORDER	£25.00	✓	COMPLETED
14 Apr	Margaret Hartley	General fund	STANDING_ORDER	£40.00	✓	COMPLETED
14 Apr	Ravi Patel	General fund	STANDING_ORDER	£75.00	✓	COMPLETED
14 Mar	Eleanor Voss	General fund	STANDING_ORDER	£30.00	✓	COMPLETED
14 Mar	Chidi Okonkwo	General fund	STANDING_ORDER	£50.00	✓	COMPLETED
14 Mar	Grace Owusu	General fund	STANDING_ORDER	£20.00	✓	COMPLETED
14 Mar	Margaret Hartley	General fund	STANDING_ORDER	£40.00	✓	COMPLETED
14 Mar	Geoff Hartley	General fund	STANDING_ORDER	£25.00	✓	COMPLETED
14 Mar	Ravi Patel	General fund	STANDING_ORDER	£75.00	✓	COMPLETED
14 Feb	Eleanor Voss	General fund	STANDING_ORDER	£30.00	✓	COMPLETED
14 Feb	Chidi Okonkwo	General fund	STANDING_ORDER	£50.00	✓	COMPLETED
14 Feb	Grace Owusu	General fund	STANDING_ORDER	£20.00	✓	COMPLETED
14 Feb	Margaret Hartley	General fund	STANDING_ORDER	£40.00	✓	COMPLETED
14 Feb	Geoff Hartley	General fund	STANDING_ORDER	£25.00	✓	COMPLETED
14 Feb	Ravi Patel	General fund	STANDING_ORDER	£75.00	✓	COMPLETED

Online gifts arrive as Pending until the card payment is confirmed (provider checkout wired in a follow-up step). Manual entries are marked received immediately.

Giving — gifts, funds with targets, and Gift Aid in one place.

Claiming Gift Aid

When it's time to claim, use **Export Gift Aid (CSV)** on the Giving page. It produces a file in HMRC's Charities Online schedule layout — title, first/last name, house number, postcode, donation date and amount — for the Gift-Aided, completed gifts in the period. Open it, check it, and submit through HMRC.

Keeping the donor's name, address and postcode on each gift (captured automatically on the public Give form) is what makes the claim possible.

Year-end statements

Produce a statement for any donor in a couple of clicks from **Giving** → **Giving statements**: choose the year, and each donor gets a clean, printable summary of everything they gave, with Gift Aid marked — ready to hand out or email at tax time.

Giving & Funds St Aidan's Parish (Demo)

You're exploring a **live demo** of Vestry — try anything you like; the sample data resets every few minutes. [Get Vestry for your church](#) →

Annual giving statements for each named donor. Anonymous gifts are excluded. ← Giving

Tax year ending / calendar year: **2026** 2025 2024 2023 2022

DONOR	GIFTS	TOTAL 2026	GIFT AID	
Ravi Patel <small>ravi.patel@example.com</small>	5	£375.00	£375.00	Statement →
Chidi Okonkwo <small>chidi.okonkwo@example.com</small>	5	£250.00	£250.00	Statement →
Anonymous	1	£250.00	—	Statement →
Margaret Hartley <small>margaret.hartley@example.com</small>	5	£200.00	£200.00	Statement →
Eleanor Voss <small>eleanor.voss@example.com</small>	5	£150.00	£150.00	Statement →
Geoff Hartley <small>geoff.hartley@example.com</small>	5	£125.00	£125.00	Statement →
Grace Owusu <small>grace.owusu@example.com</small>	5	£100.00	£100.00	Statement →
Plate collection	1	£15.00	—	Statement →

[Feedback](#)

Annual giving statements — per donor, ready to print.

Finance, budgets & counting

Finance & Budgets gives you the wider picture: income and expenditure by fund, budgets you can track against, and the Sunday **count reconciliation** (cash, envelopes, contactless). It exports for your accounts, so you get the overview without a separate spreadsheet.

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guest@demo

Dashboard St Aidan's Parish (Demo)

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£1,465.00
Income (received gifts)

£2,165.00
Expenses (3)

£-700.00
Net

Collection counting →

Budget vs actual (by fund)

FUND	BUDGET	INCOME	SPENT	NET	PROGRESS
General fund	£42,000	£1,200.00	£365.00	£835.00	<div style="width: 10%;"></div>
Missions	£8,000	£15.00	£0.00	£15.00	<div style="width: 0%;"></div>
Roof appeal	£30,000	£250.00	£1,800.00	£-1,550.00	<div style="width: 10%;"></div>
General (no fund)	—	£0.00	£0.00	—	<div style="width: 0%;"></div>

Record an expense

Amount (£) Date

Category Fund

Payee / notes

Recent expenses

- 30 May Office - Viking - General fund £45.00
- 30 May Roof works - Peak Roofing - Roof appeal £1,800.00
- 30 May Utilities - British Gas - General fund £320.00

Income is your received (completed) gifts; budgets are the fund targets set under Giving. Expenses are recorded here.

Finance — budgets, funds and the Sunday count.