

YourCause® CSRconnect Job Aide

How to Download a Data Feed

Start:

CSRconnect Client Admin Panel, Data Hub. **NOTE:** Data feeds must be activated by your Account Manager and you must have permissions to 'Download Data Feeds' before you may proceed.

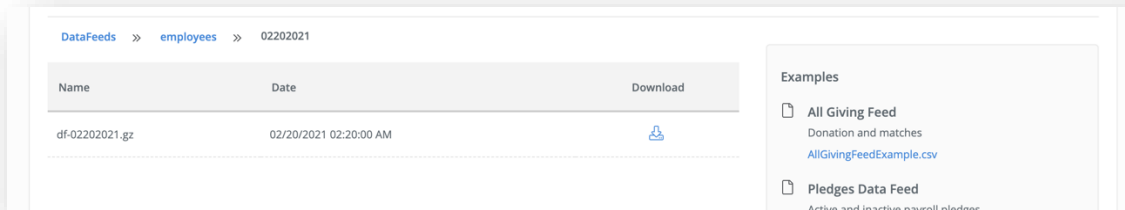
- Visit the YourCause CSRconnect Client Admin Panel > Report > Data Hub
- Click on the 'Data Feeds Tab'

The screenshot shows the 'Data Hub' interface. On the left is a navigation sidebar with 'yourcorp' logo and 'CSRconnect Admin' title. The main content area is titled 'Data Hub' and has a sub-tab 'Data Feeds'. Below the title is a description: 'Data Hub allows you to retrieve data from your community. Expand this section to learn more...'. There are tabs for 'Exports' and 'Data Feeds'. A warning message states: 'Due to the nature of the data, it's important to protect your SFTP access credentials and to only share with proper internal team members.' Below this is a table of 'DataFeeds' with columns 'Name', 'Date', and 'Download'. The table lists: 'custom_questions', 'donations', 'employees', 'volts', and 'sdg'. To the right of the table is an 'Examples' section with links to 'All Giving Feed', 'Pledges Data Feed', and 'New Volunteer Data Feed'.

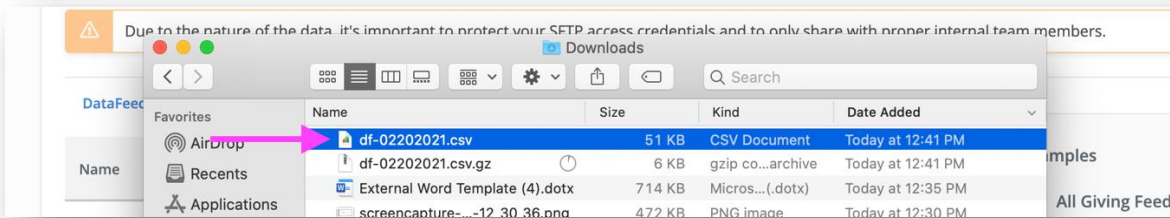
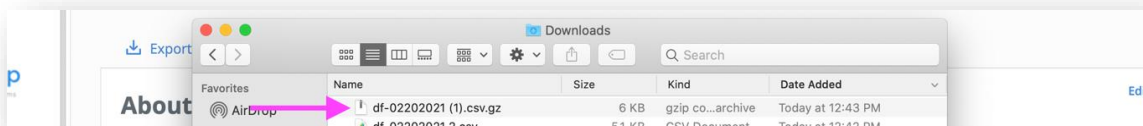
- Double click on the 'DATA FEED NAME' link, this will open a list of dated files
- Double click on the top file, this is the most recent date

This screenshot shows a detailed view of the 'employees' data feed. The breadcrumb path is 'DataFeeds >> employees'. The table has four columns: 'Name', 'Date', 'Download', and 'Retry'. The rows show dates from 02202021 to 02112021. Each row has a 'Download' link and a 'Retry' link. The 'Examples' section on the right includes 'Employees Data Feed' with the file name 'EmployeesFeedExample.csv'.

- This will produce a download option to download a .csv.gz file to your Downloads folder on your computer.



- Double click on that 'zip' file in Downloads and it will generate a .csv file
- Open this .csv file up in Excel



NOTE: These instructions were created using a Mac OS.