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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'

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Elevate Your CSR Programs	Data Hub			
CSRconnect Admin	Data Hub allows you to retrieve data from	your community. Expand this section to learn more.		~
Home	🕁 Exports 🔊 Data Fee	ds		Try the new Data Hul
Report ^	About Data Feeds			Edit SFTP Configurations
Insights Dashboard Data Hub	What is a data feed? A data feed is manipulate and map the data in th donated on your intranet and have	an automated daily transfer of bulk data from eir own system. Access all data from your co e the totals updated each day.	n your community to an SFTP folder. C mmunity without having to pull massiv	ommon uses: Use your community's raw data to e exports. Display total hours volunteered and dollars
🖇 Jobs and Imports	Due to the nature of the data	a, it's important to protect your SFTP access cred	entials and to only share with proper inter	rnal team members.
🖗 Jobs and Imports	Due to the nature of the data DataFeeds	a, it's important to protect your SFTP access cred	entials and to only share with proper inter	mai team members.
Sobs and Imports	Due to the nature of the data DataFeeds Name	s, it's important to protect your SFTP access cred Date	entials and to only share with proper inter	nai team members.
Jobs and Imports Users ~ 2 Engagements ~	Due to the nature of the data DataFeeds Name custom_questions	, it's important to protect your SFTP access cred Date	entials and to only share with proper inter Download	Examples Distance and matches
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globs and Imports 1 Users 2 Engagements 2 Community Settings 2 Budgeting	Due to the nature of the data Data/reeds Name custom_questions donations employees	, it's important to protect your SFTP access cred Date	entials and to only share with proper inter Download 	Examples Examples All Giving Feed Dotation and matches ADV/org/FeedLample.cvv Pledges Data Feed Active and matche paprol pideges Pledges fact afferder
	Due to the nature of the data DataFeeds Name custom_questions employees vols	, it's important to protect your SFTP access cred Date	entials and to only share with proper inter Download	Mail team members. Examples All Giving Feed Dotation and matches Adviourgfeed.Dample.cv Pledges Data Feed Active and mackine payroli pidges Pledges data Feed New Volunteer Data Feed 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

Exports	A Data Feeds			Try the new Data Hub
About Data I /hat is a data feed? A nanipulate and map th onated on your intrar	Feeds data feed is an automated daily he data in their own system. Acc het and have the totals updated	r transfer of bulk data from your comm cess all data from your community wit each day.	nunity to an SFTP folder. C hout having to pull massiv	Edit SFTP Configurations Common uses: Use your community's raw data to we exports. Display total hours volunteered and dollars
Due to the nature	re of the data, it's important to pro	otect your SFTP access credentials and to	only share with proper inte	rnal team members.
DataFeeds » emp	Date	Download	Retry	Examples
02202021	-	-	C	All Giving Feed Donation and matches AllGivingEeedExample csv
02192021	-	-	C	Pledges Data Feed
02182021	-	-	C	Active and inactive payroll pledges PledgeDataFeedExample.csv
02132021	-	.=	C	New Volunteer Data Feed New volunteer transactional data
02122021	-	-	C	NewVolunteerFeedExample.csv
02112021	**		C	Employees Data Feed Employees data

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

Name	Date	Download	Examples
			All Giving Feed
df-02202021.gz	02/20/2021 02:20:00 AM	<u>&</u>	Donation and matches
			AllGivingFeedExample.csv
			Pledges Data Feed

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

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NOTE: These instructions were created using a Mac OS.