

DONATION REPORTING

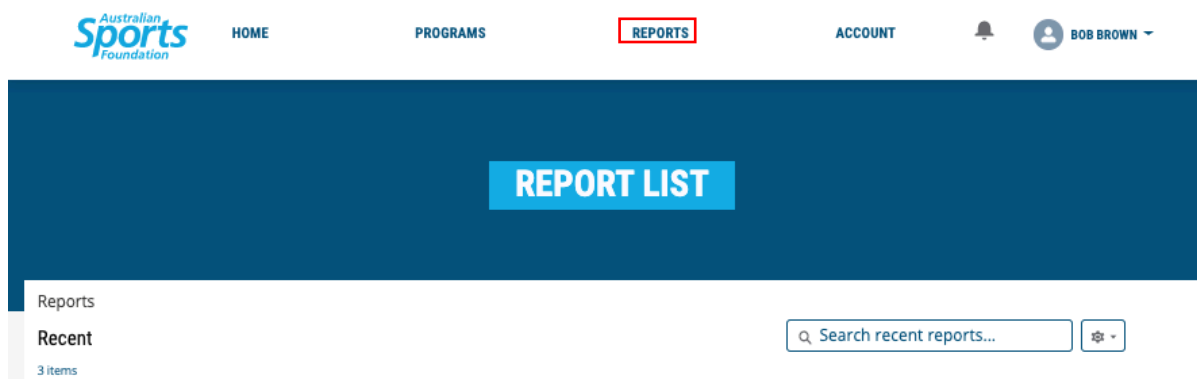
Want to know who has donated to your projects/campaigns? Look no further! In your portal, you can run donation reports to see who has donated, when they donated and how much. Unless a donor has opted to remain anonymous, we also provide you with their contact details so you can thank them and keep them up to date on the progress of your project/s.

From your Home page you'll be able to see some useful stats and information, including a dashboard representation of the most frequently used reports including;

- Your total donations for the last four months
- Your recent donations
- How you're tracking against your project target/s
- Your donation totals for the last four financial years

You can also access more detailed reports, filter, sort, view and download, all from within your portal.

1. Start by selecting the REPORTS tab.



2. The default view is Recent so if you can't see the report you're looking for switch across to All Reports.

The screenshot shows the 'All Reports' view selected in the left sidebar. The main content area displays a table of reports with the following columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'All Reports' tab is highlighted in red in the sidebar.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	1a. Donations Report (Rec	Details of dona...	Community Repo	Web Admin	11/11/2019, 13:...	
Created by Me	1b. Donations Report (Rec	Details of dona...	Community Repo	Web Admin	18/11/2019, 10:...	
Private Reports	1c. Donations Report (Reg	Details of dona...	Community Repo	Web Admin	18/11/2019, 10:...	
All Reports						

- Select the appropriate report from the list. For example DONATION REPORT (RECONCILED), which will list all donations for your project that have been finalised.

Reports

All Reports

Search all reports...

15 items

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Recent	1a. Donations Report (Rec	Details of dona...	Community Repo	Web Admin	11/11/2019, 13:...	
Created by Me	1b. Donations Report (Rec	Details of dona...	Community Repo	Web Admin	18/11/2019, 10:...	
Private Reports	1c. Donations Report (Reg	Details of dona...	Community Repo	Web Admin	18/11/2019, 10:...	
All Reports						

- You now have the option to customise your report by;

FILTERS:



Use the funnel icon to customise your reports with filters:

Status – Any status, paid, reconciled, failed, cancelled

Date – selected from and end dates

If you do update the filters on a report, select Apply to view the customised data.

Please note the following status:

- Reconciled** = Completed (i.e. the transaction has been processed through our payment gateway and the donor has received their receipt).
- Paid** = Pending (i.e. the transaction is not complete, and the donation requires reconciliation. The donor has not received a receipt.) You do not need to do anything here- our finance team will follow up with the donor if the payment is not received to finalise the donation.

SORT:

You can sort report data by clicking on a field heading, a single click will arrange results in ascending order, click again and results will rearrange in descending order. For example, this report has been sorted by DONATION DATE newest to oldest.



REPORT
1a. Donations Report (Reconciled)



Total Records: 20 Total Donation Amount: \$60,300.00 Total Fee Amount: \$100.00 Total Retention Amount: \$200.00 Total Project Amount: \$60,000.00

DONATION DATE ↓	DONOR NAME	DONATION AMOUNT	FEE AMOUNT	RETENTION AMOUNT	PROJECT AMOUNT	PROJECT: PROJECT NAME	PAYMENT METHOD	FREQUENCY	DONOR EMAIL	ORGANISATION (CORPORATE DONOR)
11/10/2019 11:00 AM	Corey Yeatman2	\$5,015.00	\$5.00	\$10.00	\$5,000.00	Clubhouse Repairs	EFT	-	corey.yeatmanabc@gmail.com	
11/10/2019 11:00 AM	Corey Yeatman2	\$5,015.00	\$5.00	\$10.00	\$5,000.00	Clubhouse Repairs	EFT	Monthly	corey.yeatmanabc@gmail.com	
11/10/2019 11:00 AM	Corey Yeatman2	\$5,015.00	\$5.00	\$10.00	\$5,000.00	New Boats	EFT	-	corey.yeatmanabc@gmail.com	
11/10/2019 11:00 AM	Corey Yeatman2	\$5,015.00	\$5.00	\$10.00	\$5,000.00	New Boats	EFT	Monthly	corey.yeatmanabc@gmail.com	
11/09/2019 10:00 AM	Corey Yeatman2	\$4,015.00	\$5.00	\$10.00	\$4,000.00	Clubhouse Repairs	EFT	-	corey.yeatmanabc@gmail.com	
11/09/2019 10:00 AM	Corey Yeatman2	\$4,015.00	\$5.00	\$10.00	\$4,000.00	Clubhouse Repairs	EFT	Monthly	corey.yeatmanabc@gmail.com	
11/09/2019 10:00 AM	Corey Yeatman2	\$4,015.00	\$5.00	\$10.00	\$4,000.00	New Boats	EFT	-	corey.yeatmanabc@gmail.com	
11/09/2019 10:00 AM	Corey Yeatman2	\$4,015.00	\$5.00	\$10.00	\$4,000.00	New Boats	EFT	Monthly	corey.yeatmanabc@gmail.com	
11/08/2019 10:00 AM	Anonymous Donor	\$3,015.00	\$5.00	\$10.00	\$3,000.00	Clubhouse Repairs	EFT	-	Anonymous Donor	Anonymous Donor

The following fields are provided in your report, most of these fields can be used for sorting data.

DONATION DATE

DONOR NAME

DONATION AMOUNT - the total amount donated.

FEE AMOUNT- any credit card fees that apply to processing the donation

RETENTION AMOUNT - the amount the Sports Foundation retains; (5% for online donations and 6% for offline/manual donations).

PROJECT AMOUNT - the amount you will be receiving in a grant payment.

PROJECT NAME – Name of project the donation has been made to

PAYMENT METHOD- EFT/Credit card

FREQUENCY – One off or recurring/regular

DONOR EMAIL- This is where the donation receipt is sent to

ORGANISATION (Corporate Donor) – Business/Company name

STATUS – refer below

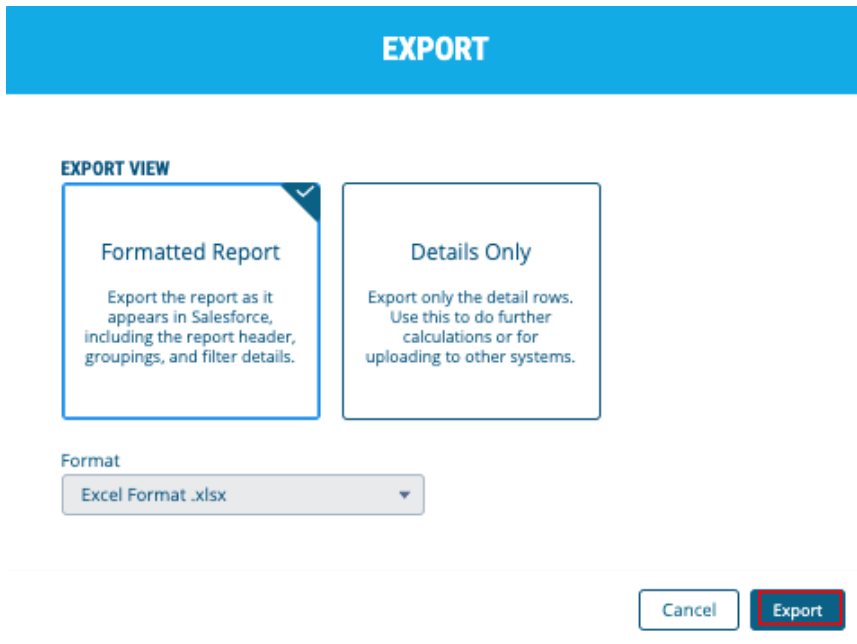
ORGANISATION NAME – Name of the fundraising organisation or athlete

DONATION NAME: Reference for the donation record

5. You can download your reports at any time by clicking EXPORT.



Your exported report will be an Excel file and you have the choice of selecting Formatted Report or Details Only.



FORMATTED REPORT: This is the best format for simply viewing your report, it will be formatted as you see it in the portal.

DETAILS ONLY: This option is best if you plan on further editing or calculations within Excel or another system.

6. Click EXPORT and depending on what type of computer you're using, the file should automatically open or appear in your downloads section.