

# DONATION REPORTING

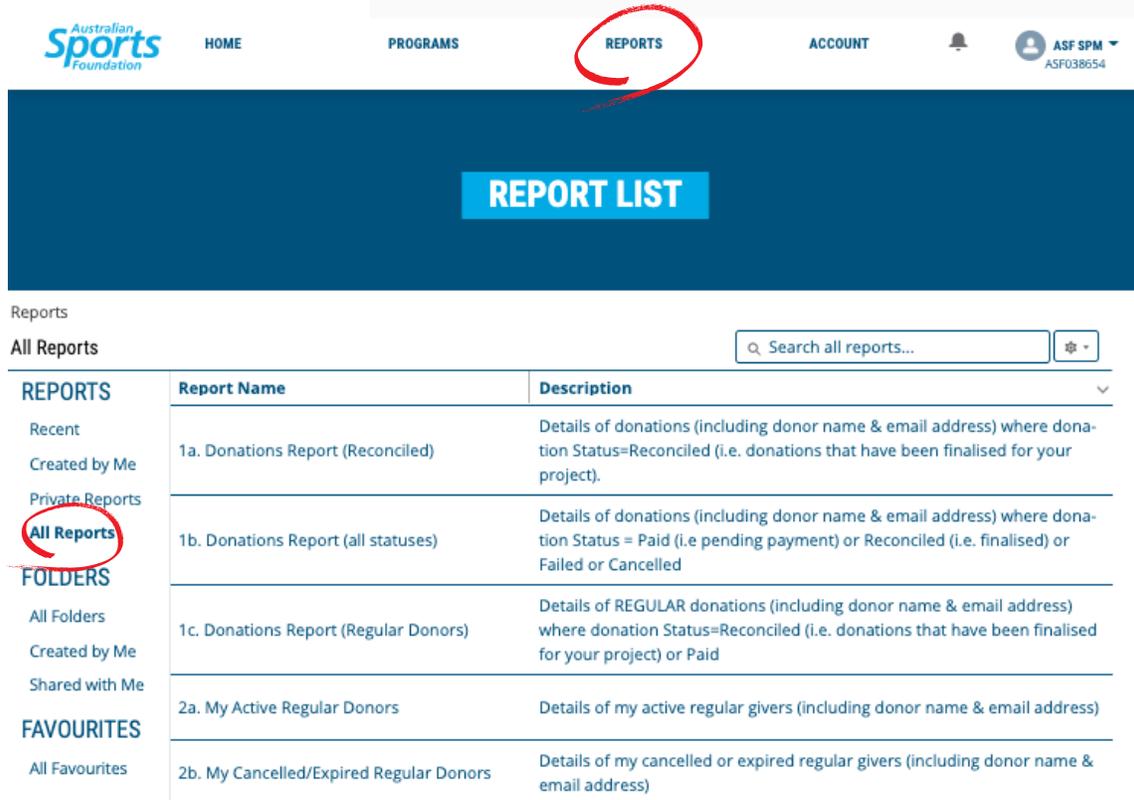
Want to know who has donated to your projects/campaigns? Look no further! In your portal, you can run donation reports to see who has donated, when they donated and how much. Unless a donor has opted to remain anonymous, we also provide you with their contact details so you can thank them and keep them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



The screenshot shows the Australian Sports Foundation portal navigation bar with 'REPORTS' highlighted. Below is the 'REPORT LIST' page with a search bar and a table of reports. The 'All Reports' option in the left sidebar is circled in red.

REPORTS	Report Name	Description
Recent	1a. Donations Report (Reconciled)	Details of donations (including donor name & email address) where donation Status=Reconciled (i.e. donations that have been finalised for your project).
Created by Me	1b. Donations Report (all statuses)	Details of donations (including donor name & email address) where donation Status = Paid (i.e. pending payment) or Reconciled (i.e. finalised) or Failed or Cancelled
Private Reports	1c. Donations Report (Regular Donors)	Details of REGULAR donations (including donor name & email address) where donation Status=Reconciled (i.e. donations that have been finalised for your project) or Paid
<b>All Reports</b>	2a. My Active Regular Donors	Details of my active regular givers (including donor name & email address)
FOLDERS	2b. My Cancelled/Expired Regular Donors	Details of my cancelled or expired regular givers (including donor name & email address)
All Folders		
Created by Me		
Shared with Me		
FAVOURITES		
All Favourites		

2. 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

REPORTS	Report Name	Description
Recent	1a. Donations Report (Reconciled)	Details of donations (including donor name & email address) where donation Status=Reconciled (i.e. donations that have been finalised for your project).
Created by Me		
Private Reports		
All Reports	1b. Donations Report (all statuses)	Details of donations (including donor name & email address) where donation Status = Paid (i.e pending payment) or Reconciled (i.e. finalised) or

3. Customise your report.

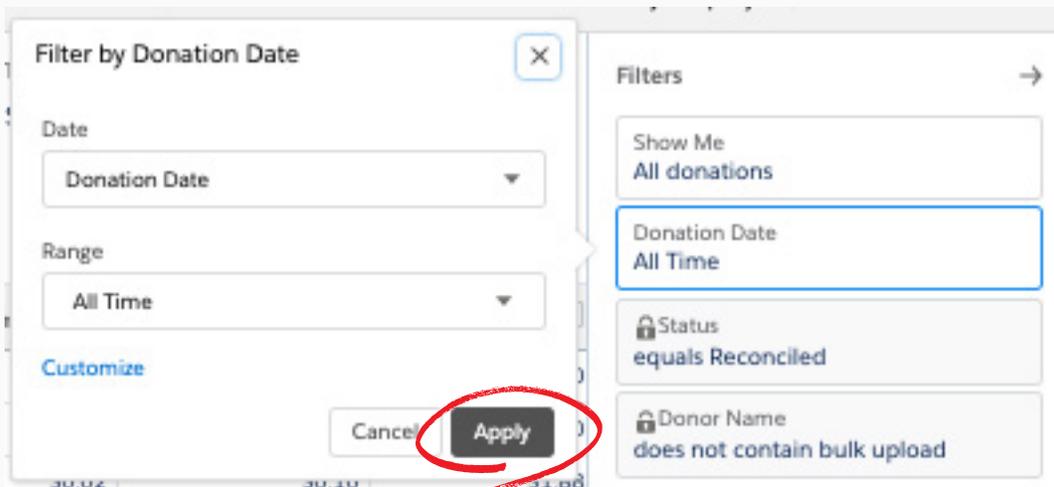
## Use the funnel icon to customise your report with filters:

**STATUS:** Any status, paid, reconciled, failed, cancelled

**DATE:** selected from and end dates

If you do update filters, select Apply to view the customised data, and Export to download as an Excel spreadsheet.

You can also sort a report by clicking on the field heading.



## The report will provide you with the following information;

<b>DONATION DATE</b>	
<b>DONOR NAME</b>	
<b>DONATION AMOUNT</b>	The total amount donated.
<b>FEE AMOUNT</b>	Any credit card fees that apply to processing the donation
<b>RETENTION AMOUNT</b>	The amount the ASF retains; (5% for online donations and 6% for offline/manual donations).
<b>PROJECT AMOUNT</b>	The amount you will be receiving in a grant payment.
<b>PROJECT NAME</b>	Name of project the donation has been made to
<b>PAYMENT METHOD</b>	EFT/Credit card
<b>FREQUENCY</b>	One off or recurring/regular
<b>DONOR EMAIL</b>	This is where the donation receipt is sent to
<b>ORGANISATION (Corporate Donor)</b>	Business/Company name
<b>STATUS</b>	Refer below
<b>ORGANISATION NAME</b>	Name of the fundraising organisation or athlete
<b>DONATION NAME</b>	Reference for the donation record

### **Please note the following status descriptions:**

- 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.

<b>SORT</b>	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 DONOR NAME.
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Report: Donations2  
**1a. Donations Report (Reconciled)**  
 Details of donations (including donor name & email address) where donation Status=Reconciled (i.e. donations that have been finalised for your project).

Total Records: 559    Total Donation Amount: \$9,391,167.83    Total Fee Amount: \$1,098.31    Total Retention Amount: \$459,632.61    Total Project Amount: \$8,604,784.91

Total Do not publicly acknowledged...: 10

	Donation Date	Donor Name	Donation Amount	Fee Amount	Retention Amount	Project Amount
1	19/03/2018 11:00 AM	A	\$1,000.00	\$0.00	\$50.00	\$950.00
2	12/12/2018 11:00 AM	B	\$70.00	\$0.00	\$3.50	\$66.50
3	13/03/2019 11:00 AM	C	\$1,000.00	\$0.00	\$50.00	\$950.00
4	16/12/2019 11:00 AM		\$25.00	\$0.00	\$1.25	\$23.75
5	11/05/2017 10:00 AM		\$20.00	\$0.00	\$1.20	\$18.80

Filters: Show Me All donations, Donation Date All Time, Status equals Reconciled, Donor Name does not contain bulk upload

4. Once you are happy with your report, you may download it by clicking EXPORT.

Report: Donations2  
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Your exported report will be an Excel file and you have the choice of selecting Formatted Report or Details Only.

**EXPORT**

**EXPORT VIEW**

**Formatted Report**

Export the report, including the report header, groupings, and filter settings.

**Details Only**

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

**FORMAT**

Excel Format.xlsx

Cancel    **Export**

**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.

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

**REPORTING COMPLETE!**