![Australian Sports Foundation - For a Sporting Future logo]
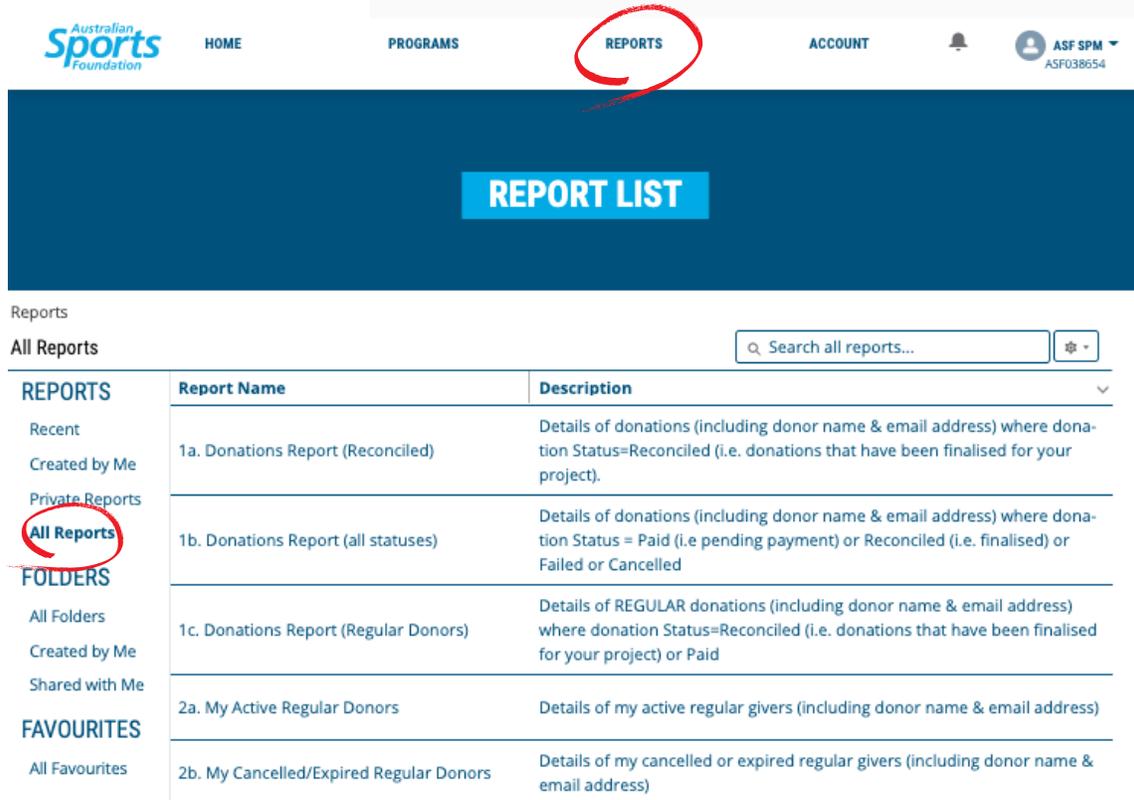
DONATION REPORTING

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.

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.
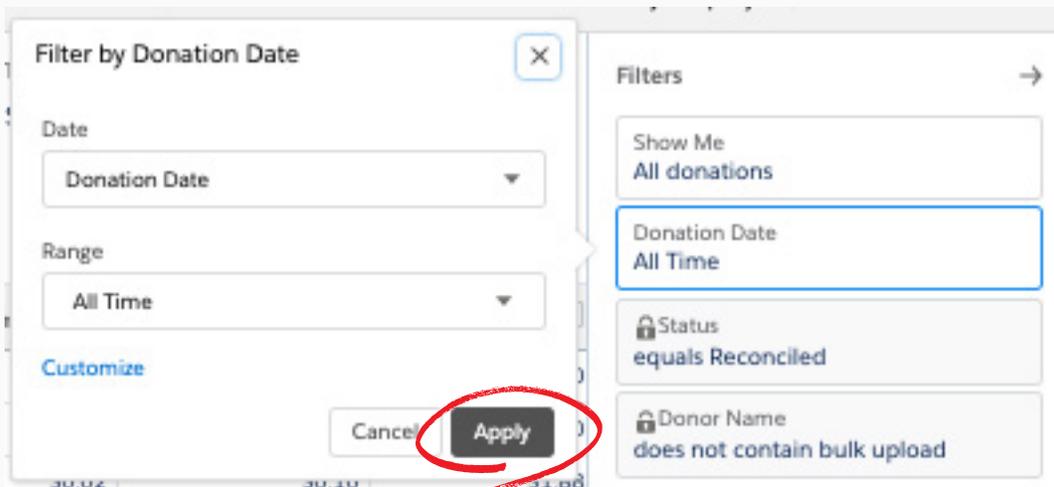

3. Customise your report.

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;

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 ASF 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

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.

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 DONOR NAME.

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

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!