

# **DONATION REPORTING**

---



# ACCESSING LIVE DONATION INFORMATION

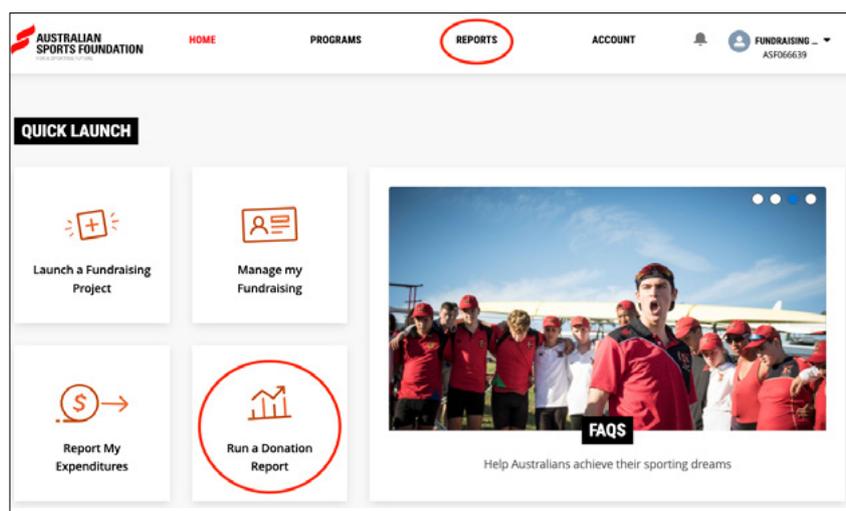
Want to know who has donated to your project/s? In the Reports section of the ASF platform, you can run donation reports to see who has donated, when they donated and how much. Unless a donor has opted to remain anonymous, we also provide you with their contact details so you can thank them and keep them up to date on the progress of the project they've so generously donated to.

The ASF has developed a number of reports that we think you'll find useful:

- Donations Report (one for all statuses and one for just reconciled donations)
- Regular Giving (i.e. those donors who have set up a recurring donation to your project/s)
- Supporter messages (so you can keep track of donor messages)
- Payments (Grants) so you can export/download a complete list of payments the ASF has made to you.

You can also filter, sort, view and download your reports- all from within the ASF platform.

Start by either selecting the REPORTS tab or clicking on the 'Run a Donation Report' quick launch tile.



Select the relevant report from the list by clicking on Run Report.

REPORT LIST		
REPORT NAME	DESCRIPTION	
1a. Donations Report (Reconciled)	Donations where Status=Reconciled (i.e. donations that have been finalised for your project)	<a href="#">Run Report</a>
1b. Donations Report (all statuses)	Donations where Status = Paid (i.e pending payment), Reconciled (i.e. finalised), Failed or Cancelled	<a href="#">Run Report</a>
1c. Donations Report (Regular Donors)	REGULAR donations where Status = Reconciled (i.e. donations that have been finalised for your project) OR Paid	<a href="#">Run Report</a>
2a. My Active Regular Donors	Details of my active regular givers (including donor name & email address)	<a href="#">Run Report</a>
2b. My Cancelled/Expired Regular Donors	Details of my cancelled or expired regular givers (including donor name & email address)	<a href="#">Run Report</a>
3. Payments (Grants) Report	Details of ASF payments received	<a href="#">Run Report</a>
4. Supporter Messages w donor details	Messages of support from your donors (NB. Includes if donor doesn't want to publicly acknowledge)	<a href="#">Run Report</a>

The Donations Reports (1a and 1b) 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**

The 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.

**DONATION NAME**

Reference for the donation record.

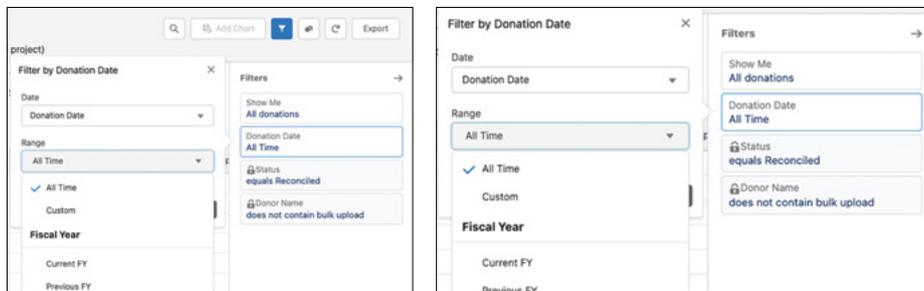
Please note the following donation status descriptions:

- 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- if the payment is not received, our finance team will follow up with the donor to finalise the donation.

**TIP: You can sort a report by clicking on the field heading.**

## FILTERING AND EXPORTING DONATION DATA

You can use the funnel icon to filter the dates that your report displays. Simply select a range or enter custom “start” and “end” dates and click on Apply to view the customised data. Select Export if you would like to download the donations report as an Excel spreadsheet.



## SORT

You can sort report data by clicking on a field heading. A single click will arrange data in ascending order, click again and the data will rearrange in descending order. For example, this report has been sorted by Donation Date.

Report: Donations2						
1a. Donations Report (Reconciled)						
Donations where Status=Reconciled (i.e. donations that have been finalised for your project)						
Total Records	Total Donation Amount	Total Fee Amount	Total Retention Amount	Total Project Amount	Total Do not publicly ac	
18	\$4,970.05	\$10.55	\$82.75	\$1,564.75	0	
	Donation Date ↓	Donor Name	Donation Amount	Fee Amount	Retention Amount	Project Amount
1	10/12/2021 2:19 PM	Kat TestVISA	\$5.05	\$0.05	\$0.25	\$4.75
2	10/12/2021 1:55 PM	Sam Smith	\$250.00	\$2.50	\$12.50	\$235.00
3	17/08/2018 10:00 AM		\$300.00	\$0.00	\$15.00	\$285.00
4	16/08/2018 10:02 AM	Eddy Strobel	\$303.00	\$3.00	\$15.00	\$285.00
5	16/08/2018 10:00 AM		\$300.00	\$0.00	\$15.00	\$285.00
6	10/08/2018 12:19 AM		\$200.00	\$2.00	\$10.00	\$188.00
7	7/08/2018 7:42 PM		\$300.00	\$3.00	\$15.00	\$282.00
8	30/07/2018 8:27 AM		\$300.00	\$0.00	\$0.00	\$0.00
9	24/07/2018 10:00 AM		\$100.00	\$0.00	\$0.00	\$0.00
10	29/06/2018 10:00 AM		\$300.00	\$0.00	\$0.00	\$0.00
11	25/06/2018 10:00 AM		\$300.00	\$0.00	\$0.00	\$0.00

Once you're happy with your report, you can download it as a spreadsheet by clicking EXPORT.

## FORMATTED REPORT

This is the best format for simply viewing your report, it will be formatted as you see it in the ASF platform.

## DETAILS ONLY

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

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