



Preparing a Payout Report for Fiscally Sponsored Organizations

IF YOU ONLY FISCALLY SPONSOR SOME OF YOUR ORGANIZATIONS:

1. From your Partner Dashboard on the Organizations tab, click the Actions button, then Export CSV in the dropdown menu.
2. Check your email and click the link in the email from GiveGab to download the report.
3. Look in column I “Fiscally Sponsored” to see which organizations are fiscally sponsored and therefore need a payout report.
4. If you want to use excel to sort out the “Yes” organizations:
 - a. Save-As an Excel Workbook to allow you to save work with the features we’re about to use.
 - b. Click the “Sort & Filter” button in your Home tool ribbon (probably towards the right side in Editing)
 - c. Select “Custom Sort” in the dropdown menu
 - d. In the “Sort by” field, scroll down to choose “Fiscally Sponsored,” then in the “Order” field, scroll down to choose “Z to A”.
 - e. Click “Add Level” button on top left; Next to “Then by” choose “Organization” and ensure the “Order” field for that row is “A to Z”. Click “Ok”
 - f. Now all “Yes” organizations will be at the top, alphabetically by name.
 - g. ATTENTION: Column O “Amount Raised” in this report IS NOT your accurate payout amount because it includes offline donations and does not calculate for fees that have been deducted! *DO NOT use Column O on this report to determine payout reports. You must pull a donation report to see the net Payout Amount.*

PULLING INDIVIDUAL ORGANIZATION PAYOUT REPORTS

1. From your Partner Dashboard, go to the Donations tab
2. In the “Organizations” field, enter the name of the first organization you fiscally sponsor and press enter.
3. Click the Actions button, then Export CSV in the dropdown menu.
4. Check your email and click the link in the email from GiveGab to download the report.
5. Save-As an Excel Workbook with the name of the organization for your files.
6. Click the “1” in the top left corner to select the top row.
7. Click the “Sort & Filter” button in your tool bar towards the right, scroll down to select “Filter”
8. Scroll over to find Column AN “Donation Type” and click the down arrow.
UNCHECK all but the Online Donations. ***note that if you are also allocating*

prize, group-wide match or DAF funds, you will need to alter this step accordingly or pull separate reports.

9. Scroll back to Column AA “Payout Amount,” select the top amount in Row 2, Column AA, and – while continuing to hold your mouse button – scroll down to the amount in the bottom row, then release.
10. Look in the very bottom panel of your Excel sheet towards the right to find “Sum \$XXXX.” That is your organization’s payout total.
11. Continue the process for each organization.

CREATING A SINGLE PAYOUT REPORT FOR FISCALLY SPONSORED ORGANIZATIONS

1. From your Partner Dashboard, go to the Donations tab
2. Under “Donation Type,” choose “Online Donations,” then click the “Actions” button and scroll down to “Export CSV”.
 - a. *Note that this will ONLY show the online donations that came through the organization’s profile page. This will not include offline gifts for prizes or DAF designations. If you want to include those, you will have to pull individual reports by each organization.*
3. Check your email and click the link in the email from GiveGab to download the report.
4. Save-As an Excel Workbook to allow you to save work with the features we’re about to use.
5. Click the “Sort & Filter” button in your Home tool ribbon (probably towards the right side in Editing)
6. Select “Custom Sort” in the dropdown menu
7. In the “Sort by” field, scroll down to choose “Organization,” then click “Ok”
8. Select the number immediately below the last entry for your first organization, then click “Insert” in your tool ribbon to add an empty row between the first and second organization’s list of donations.
9. Scroll over to Column AA “Payout Amount.” In the empty cell in the newly created row under Payout Amount, enter “=SUM(“ then select the bottom AA cell amount and – while continuing to hold your mouse button – scroll up to the first donation for that organization, then press Enter. You should now have a total in the AA cell of the otherwise empty row. That is the Payout Total for your first organization.
10. Continue the process for each organization.
11. ATTENTION: *If you only fiscally sponsor SOME organizations, be sure to refer back to your first report to delete the NO organizations and only calculate payouts for the YES organizations.*