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# Leveraging Your Donation Report

*How to access and leverage your donor data for 2023*

CyberGrants 

 everyaction

Network  for Good™

 Social Solutions

GiveGab  salsa

 DONORTRENDS

 Mobilize

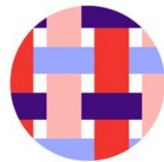
 ActionKit

Corporate Social Good  
& Philanthropy

Nonprofit Fundraising & Relationship Management

Case Management

are coming together as



**Bonterra**™

We power those who power social impact.

# A note about Stripe:

- Partnered with Stripe - PCI Level 1 Payment Processor for donation processing
- Your banking information is reviewed by Stripe
- Donor credit card information is not revealed or saved in GiveGab
- All participating organizations verified as IRS and state-recognized nonprofits
- Due to the “Know your Customer” act, updates require information about organization representatives
  - [Here is a helpful article](#)

# Important Stripe Information

- Due to a commitment to security, Stripe will occasionally flag suspicious activity during a Giving Day. If your organization is flagged, it could prevent you from collecting donations. In this instance, please reach out immediately to the blue chat bubble or to [customersuccess@givegab.com](mailto:customersuccess@givegab.com)
- GiveGab/Bonterra team will periodically check your verification status leading up to the Giving Day
- We **strongly** encourage you to keep an eye on this and report if you have received any notification from Stripe about additional verification needs
- The green checkmark will revert back to navy blue square on your profile



Get Verified to Collect Donations

# Navigating to Your Donation Report



Welcome, Jonathan!

## ★ Your Personal Fundraisers



### BakerRipley TurkeyTrot

Logan's Pups

Your Personal Goal: **\$500**

\$ \$25 Raised 155 days left 1 Donor

[View](#)

[Toolkit](#)

**5%**  
Funded



### Testing

Jon's Playground

Your Personal Goal: **\$500**

### Your Donations

View your GiveGab donation history, resend receipts to yourself, and manage recurring gifts.

[View Your Donations](#)

### Your Volunteerism

**24.0 hours**

[Log Hours](#)

Viewing Dashboard for Jonathan Nay ★

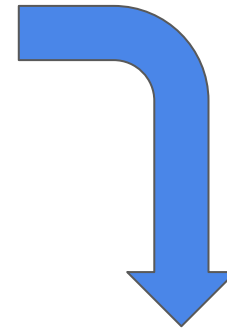


# Navigating to Your Donation Report

Complete the steps below to be sure that you are set up and ready to Hope Housing Challenge.

- Home
- Giving Days
- Reports
- Manage Organization

- ✓ Add Your Organization's Info
- ✓ Add Your Story
- ✓ Get Verified to Collect Donations
- ✓ Add Donation Levels



- Reports
- Donations
- Financials



# Understanding Your Donation Report

Search by name or email

All Giving Days & Community Giving Sites ▾

All Campaigns ▾

Any Donation Type ▾

Start



End




Actions	Donation ID	Date ▾	Donor ▾	Intended Donation ▾	Amount Charged	Bank Fees	Platform Fees	C
	4144132	5/5/2021 11:38AM	Judy Harveston jharveston@gmail.com	\$100.00	\$104.60	\$2.60	\$2.00	Ye
	4120745	5/4/2021 5:33PM	Ruby Walsh realestateruby@hotmail.com	\$300.00	\$313.19	\$7.19	\$6.00	Ye
	4118756	5/4/2021	Amy Shelton	\$50.00	\$52.45	\$1.45	\$1.00	

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COLLABORATIVE GIVING DAYS

# Filtering Your Donation Report

 Dates and times on this page are displayed in your computer's time zone. If you export your donations from this page, dates and times in that file will appear in UTC to assist with bank statement reconciliation processes. [Learn More](#)

Search by name or email + More filters




All Giving Days & Community Giving Sites ▾ All Campaigns ▾ Any Donation Type ▾

 Start   End 

**Note:** When filtering your donation report, **it is super important that you select the correct 2023 Giving Day listing from the “All Giving Days & Community Giving Sites” dropdown to view donations that are only relevant to your 2023 Giving Day.** If you don’t apply this filter before exporting, you will receive *all* of your donor data from all giving days or other fundraising you have participated in on the platform.



# Filtering Your Donation Report

  	1423324	5/2/2019 10:01PM	Ca ell
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 Export CSV      Edit Bank Account Info

# Leveraging Your Historical Data

- Your 2022 donation report is a treasure trove of information - don't forget to use it as you prepare for 2023!
- Use the reporting and filtering tool we just discussed in the previous slides to pull information on donations received in 2022.
- Through your donation report you'll receive the donor's name, email address, phone number, and mailing address. Once you've exported this information as a CSV, make sure you use it to spread the word and start soliciting donors for 2023!



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**Thank you!**

*Any questions?*