Leveraging Your Donation Report

How to access and leverage your donor data for 2023
CyberGrants  

**Corporate Social Good & Philanthropy**

**everyaction**

**Nonprofit Fundraising & Relationship Management**

**Network for Good**

**Social Solutions**

**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
- 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 Turkey Trot
Logan's Pups
Your Personal Goal: $500
$25 Raised 155 days left 1 Donor
5% Funded

View Toolkit

Testing
Jon's Playground
Your Personal Goal: $500

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

Log Hours

Your Volunteerism
24.0 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.

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

Reports

- Donations
- Financials
## Understanding Your Donation Report

<table>
<thead>
<tr>
<th>Actions</th>
<th>Donation ID</th>
<th>Date</th>
<th>Donor</th>
<th>Intended Donation</th>
<th>Amount Charged</th>
<th>Bank Fees</th>
<th>Platform Fees</th>
<th>Completeness</th>
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<td>5/5/2021</td>
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</tr>
</tbody>
</table>

*Note: Details for each donation include the action, donation ID, date, donor information, intended donation amount, amount charged, bank fees, platform fees, and completion status.*
Filtering Your Donation Report

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

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!
Thank you!

Any questions?