Creating a Donation Report for Fundraising Insights

Bonterra™

Agenda

The Contribution Report

Adding Filters and Fields

Saving and Scheduling Reports

Bonterra™

Let's get ready to roll!

Bonterra

Accessing Your Reports, Two Ways

1

Reporting & Data Analysis

- National Dashboard
- Analytics Dashboards
- **Report Manager**

2
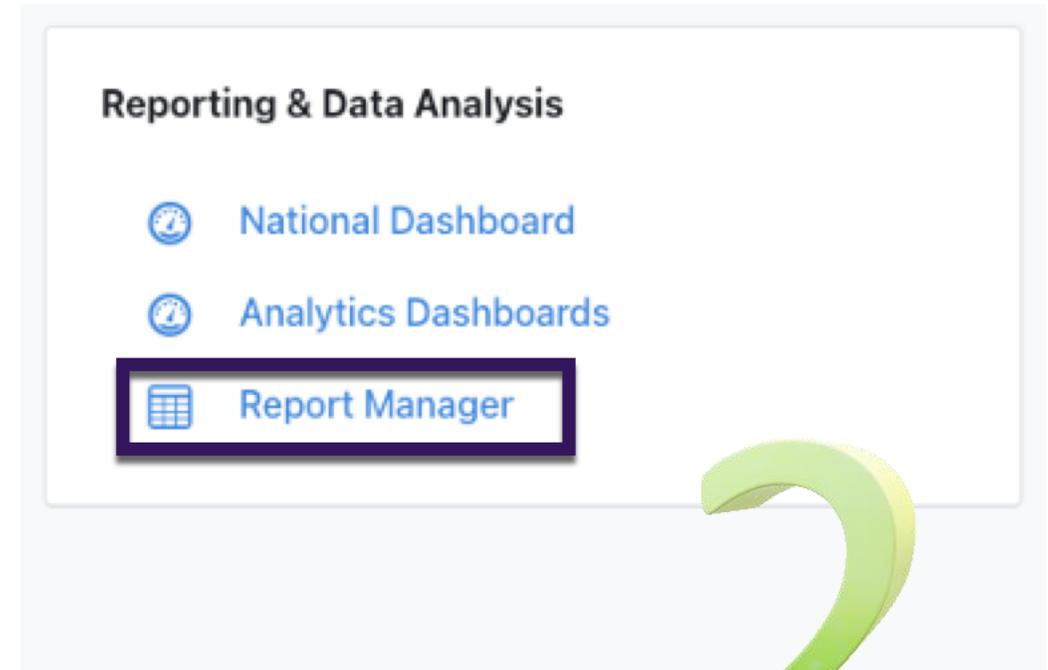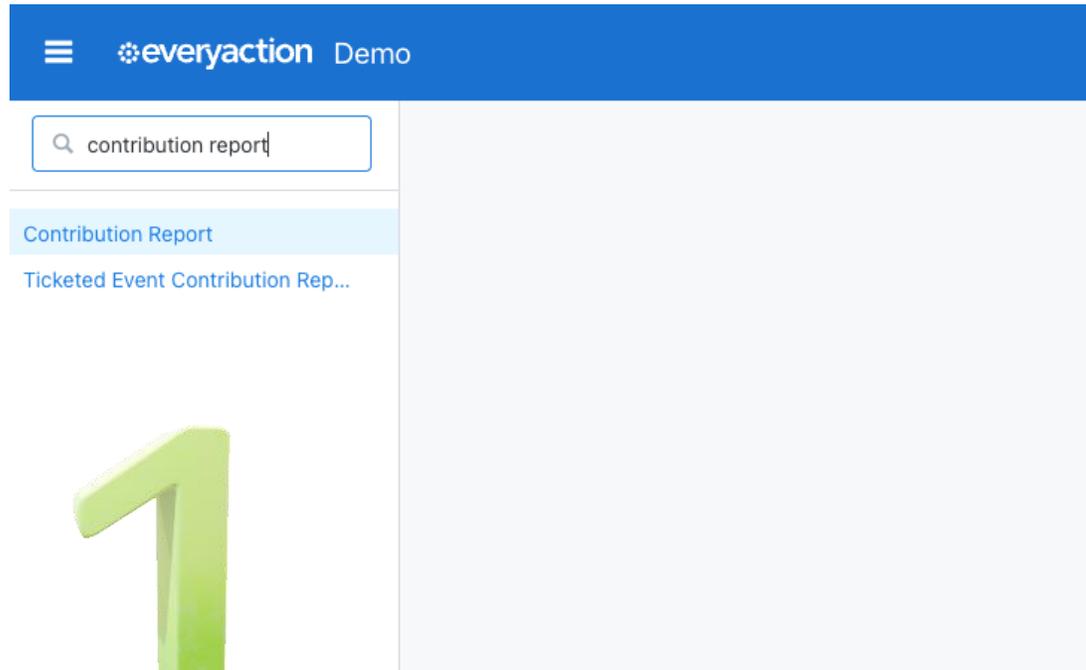
Stepping into your Reports in EveryAction

Log in to EveryAction → **Type "Contribution Report" into the Search for a Page menu** → **Click the report hyperlink**

Bonterra

Good To Knows: Contribution Reporting

- Filters will *always* show for the past Year to Date within the Contribution Report by default.

- Columns can be edited to include additional information, like Contact data, Online Action Form name, and more.

- The Group-By function allows you to table data together by an indicated field, like VANID or Contact Name.

Home / Contribution Report

Contribution Report
View all pending and settled contributions.

Export As... ▾   Report Actions ▾

Applied Filters | Edit Filters

Contact Records: All Contacts   Date Received: 12/3/23 - 12/2/24 ✕   Amount From: 0.01 ✕   Status: Multiple Selected (4) ✕

Report Summary

First Date Received	Last Date Received	Number/Count	Count of Donors	Total Contribution Amount	Avg. Contribution Amount	Total Original Contribution Amount	Avg. Original Contribution Amount	Memoed Total	Non Memoed Total
12/5/23	11/30/24	1.15K	921	$2.15M $2,147,178.63	$1.86K $1,863.87	$2.15M $2,147,591.87	$1.86K $1,864.23	$0 $0.00	$0 $0.00

Group By ▾

✎ Edit Columns

Contribution ID	VANID	Contact Name	Date Received	Amount	Source Code	Designation	Payment Method	Remaining Amount	Financial Batch
11589699	112494265	Mathias, Dan	11/30/24	$45.00		NADO (Demo) Designation	Credit Card	$45.00	20241130000 : Daily Auto-Generated Bat
11589698	112405930	Lawrence, Ilona	11/30/24	$25.00	2024 Kayaking Trip Summer	NADO (Demo) Designation	Credit Card	$25.00	20241130000 : Daily Auto-Generated Bat
11589573	112388951	Jones, Annettra	11/29/24	$25.00		NADO (Demo) Designation	Credit Card	$25.00	20241129000 : Daily Auto-Generated Bat
11588826	112494265	Mathias, Dan	11/21/24	$20.00		NADO (Demo) Designation	Credit Card	$20.00	20241121000 : Daily Auto-Generated Bat
11588115	112388951	Jones, Annettra	11/15/24	$25.00		NADO (Demo) Designation	Credit Card	$25.00	20241115000 : Daily Auto-Generated Bat
11587147	112724405	Ransom, Jaime	11/8/24	$25.00	2024 Kayaking Trip Summer	NADO (Demo) Designation	Credit Card	$25.00	20241108000 : Daily Auto-Generated Bat
11586844	112724405	Ransom, Jaime	11/8/24	$100.00	Falling For Dogs 2024	NADO (Demo) Designation	Credit Card	$50.00	Unassigned
11586842	112389478	Smith, Beverly	11/8/24	$100.00	Falling For Dogs 2024	NADO (Demo) Designation	Credit Card	$100.00	Unassigned

Bonterra

6

Let's try it out!

Bonterra™

Adding Fields to Your Report

Additional fields can be included in your report through the use of the **Edit Columns** button at the far right of your report screen.

Exporting & Actions for Your Report

An additional major factor of importance from this screen are the **Export As** and **Report Actions** buttons.

While Exporting is straightforward, the Report Actions button gives options such as:

- **Saving As** to save all filters, output fields, and groupings in your report.
- **Scheduling** your report to send to users.
- **Sending all Contacts to** *My List* for mass edits or taking other action.
- **Bulk Edit**, which allows edits to all contributions returned.

Bonterra

Accessing Saved Reports

Once reports are saved, it should be noted that these can *only* be retrieved from the **Report Manager** within EveryAction.

This will be an important thing to remember, as without your saved reports, you'd continually have to update your Contribution Reports manually.

Save Your Customized Contribution Report

- Include any necessary filters and output fields

Access the Report Manager

- Search for a Page
- Type "Report Manager"

Use the Saved Templates Tab

- Reports can be accessed and edited from this tab moving forward.
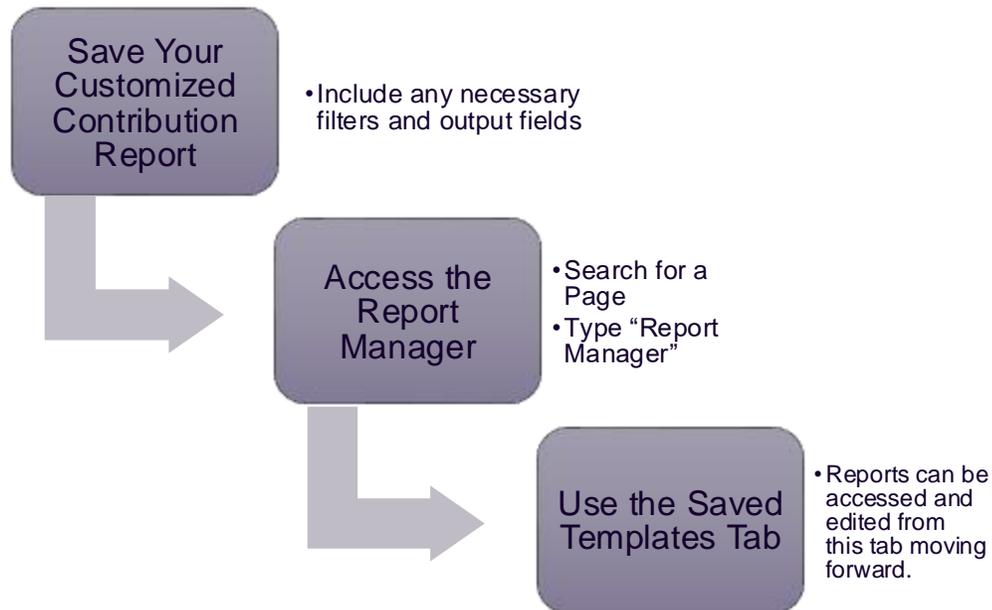
Home / Report Manager

REPORTS
Report Manager

Go to Analytics Dashboards

ⓘ To run a **Contacts Report**, use Create a New List and My List to view and filter contact records.

Recent

Default Templates

Saved Templates

Scheduled Templates

Canned Reports

Fundraising Analysis

Counts and Crosstabs

Canvass Results

PDF Report Builder

Call Sheets

Export Formats

Saved Templates

Customized report templates created by you

Filter by name   All Types

Saved by Me   All

Report Name	Last Run	Type		
Acknowledgements From Last Week **Created by** Daniel Mathias This is our scheduled report indicating that an acknowledgement should be generated and sent to any donors appearing in this list.	May 21, 2024 1:26 PM By **Daniel Mathias**	Acknowledgment	✏	🗑
Contact History Bi-Weekly **Created by** Daniel Mathias To update all members of the board on our contact outreach progress.		Contact History	✏	🗑
Phone Contact History Report Bi-Weekly **Created by** Daniel Mathias	September 24, 2024 2:56 PM By **Daniel Mathias**	Contact History Phones	✏	🗑
Contribution Report Collapsed **Created by** Daniel Mathias Grouped by contact name	October 11, 2024 11:27 AM By **Daniel Mathias**	Contributions	✏	🗑
Contribution Report_copy **Created by** Daniel Mathias		Contributions	✏	🗑
Contributions Grouped **Created by** Daniel Mathias Last year, grouped by contact for totals		Contributions	✏	🗑
Dan's Contribution Report **Created by** Daniel Mathias		Contributions	✏	🗑

Bonterra™

Additional Resources

Bonterra

Additional Learning Opportunities

Currently, EveryAction has an expansive (and growing!) library of webinars available to review tasks like:

- **Creating Online Actions**

- **Sending Targeted Emails**

- **Adding New Users**

- **Creating Contributions**

- **Configuring Your Codes**

- **And much more!**

Build confidence and knowledge in our software.

https://www.bonterratech.com/training#everyaction

Bonterra™

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM
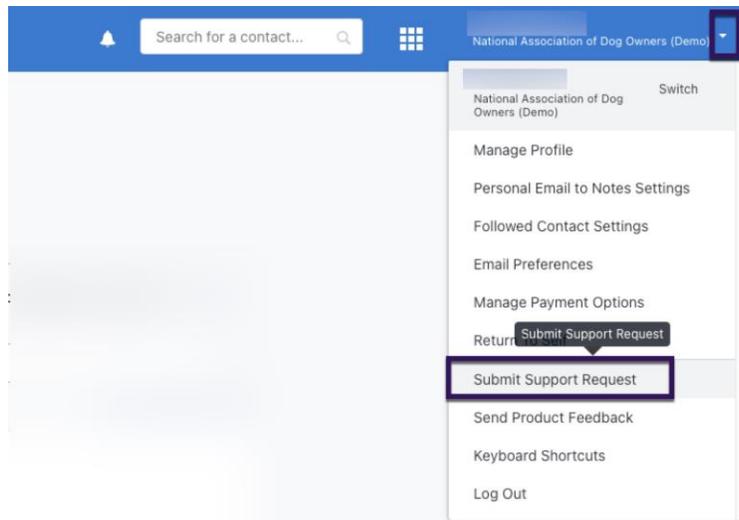
Q & A

- Ask questions about functionality covered in this training

- Ask real-life application questions

- Or sign off and we will see you in the next training!

Bonterra

Thank you for attending!

We hope to see you
in future trainings.

Bonterra™