

Reporting FAQs

Last Modified on 08/22/2024 9:33 am EDT

Where and when can I see campaign reporting details?

View reporting details both from the payment and revenue containers in the dashboard and the 'Reports' tab.

How do I export report details?

Select to Copy, CSV, Excel, PDF, or Print any report. CSV, Excel, and PDF automatically download to your computer. Copy saves the details to the clipboard to paste in a spreadsheet.

What are the most used reports?

1. Batch Report - Credit card transactions batched and deposited in the attached bank account.
2. Purchaser Details - Details related to purchasers, items, and payments made on their account.

Can I edit what is included in a report?

Download as Excel or CSV and edit or manipulate it as needed.

Where can I see the charged fees?

The transaction fees are viewable in the 'Adjustment/Fees' column of the Batch Report. Credit card transaction fees are deducted regardless if fees are passed to the purchaser. Additional service fees, outside of the reports, are sent by invoice.

Why are my fees being deducted prior to the funding activity on my batch report?

Sometimes the fees may be deducted prior to the funds being deposited in your account. This is normal behavior and you should not be alarmed by these ACH reductions, nor should you decline these ACH fees. Our Card Processing Partner has 2 departments, Funding & Transaction Fee Processing. The Funding Department has a rigorous Risk Review policy, which can cause those funds to be delayed in being deposited to your account. The fees can be processed faster, which in turn means that they may be deducted from your account prior to the deposit.

To see the details of this deduction, click on the batch report.

Mar 10, 2022	\$0.00	\$-1,950.10	\$0.00	\$-1,950.10	
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You will then see the fee details, which will look similar to this detail report.

Date	First Name	Last Name	Cardholder Name	Details	Type	Last-4	Amount	Transaction	Auth Code
				Discover Sales Discount .035000 Disc Rate Times \$755.00	Service Charges		\$-26.43	Adjustment	
				Mastercard Sales Discount .035000 Disc Rate Times \$2,906.00	Service Charges		\$-101.71	Adjustment	
				Visa Sales Discount .035000 Disc Rate Times \$36,376.00	Service Charges		\$-1,273.16	Adjustment	

Where do I see who purchased tickets?

The 'Ticket Orders' report shows who purchases a ticket along with purchaser details.

Note: Batch data takes 3-5 business days, retroactive batch data is not displayed for activity prior to December 2015.

Why doesn't the Batch and Revenue reports match?

The Revenue report includes all campaign transactions processed as cash, check, credit, or other. The Batch Report is only for credit card transactions. Therefore if cash, check, or other payments are received, the report totals don't match.

Where do I see the revenue collected for purchasers who paid the fees?

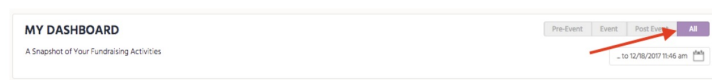
Fees [passed to the purchaser](#) are visible in the 'Transaction Fee' section of the [Revenue report](#). The funds collected come in as additional revenue to offset the credit card processing fees reflected in the [Batch Report](#).

Did the collected transaction fees cover the fees I paid?

Subtract the 'Transaction Fees' in the revenue report from the 'Adjustment/Fees' in the 'Batch Report' to see if the collected fees cover fees paid.

Why aren't the reports reflecting the most up to date information?

Date ranges can be filtered from the upper right-hand corner of the 'Reports' page. Click all to clear any filters.



Why are the leading zeros in my zip codes omitted on exported reports?

This is an Excel issue. The program automatically truncates all leading zeros from a CSV file. The simplest way to fix this is to complete the following:

- Export the CSV from GiveSmart
- ****PRIOR TO OPENING THE FILE**** save as an Excel File
- Then open the Excel file.

By following the steps above, the leading zeroes should be preserved. For additional assistance and troubleshooting, click [here](#).

Why would my number of Total Viewers on a presentation page be greater than the total number of Registered Users + Guests?

When a viewer lands on the presentation page, they are prompted to enter the Total Number of Viewers who are viewing this presentation with them. They are able to enter any numerical value between 1-100. If the value entered is greater than 1, then the Total Number of Viewers is going to be greater than the sum of Registered Users + Guests.

Where can I view the responses from my custom purchaser question?

Custom purchaser question responses can be found on the [Purchaser Detail Report](#).

What timezone is represented in the reports?

The timestamps in the reports are shown in the timezone your computer is set to. By changing your timezone setting on your computer, the timestamps in the reports will update to reflect the new setting.