

Procedure to create a Donor Report /Export in Blackbaud Sphere

First Time Setup and Run

Use this procedure to configure report about payments/donations made for each supporter and patient.

Note: This method allows you to run a single report across multiple forms/events/initiatives.

1. Select **Control > Report Center > Billing > Payment Details Report**

a. Choose Accounts

- i. Accept default values.
- ii. Click **Save and Next**

b. Choose Initiatives

i. Select the option – Choose Individual Initiatives (screen will refresh)

Events
Pick the radio button for the filter option you would like. You may retrieve events by type or select individual initiatives.

☐ Specify the type of Initiative

All Initiatives of type ---All Types---

☒ Choose Individual Initiatives

ii. Search for initiatives:

Events
Pick the radio button for the filter option you would like. You may retrieve events by type or select individual initiatives.

☐ Specify the type of Initiative

All Initiatives of type ---All Types---

☒ Choose Individual Initiatives

Search for Account Name Starts With National **Search**

1. Search for – Account Name – Starts With – <<Org Name>>
2. Click **Search** (screen will refresh with list)
3. Using the ‘Type’ column for reference , place a check next to each column where type is equal to ‘Kinterthon’ and ‘Single Step Donation’
4. Click the **Add to Selection** button (screen will refresh, list of selections will appear at the bottom of the screen)

iii. Click **Save and Next**

c. Choose Event Groups

- i. Accept default values.
- ii. Click **Save and Next**

d. Choose Data

- i. Uncheck all fields, then select all of the following fields and sort:
 1. Contacts Profile > Contact Fields
 - a. Title
 - b. First Name
 - c. Middle Name
 - d. Last Name
 - e. Suffix
 - f. Company Name
 - g. Phone
 - h. Email
 2. Contacts Profile > Contact Fields > Address Info > Mailing Address
 - a. Mailing Address Line 1
 - b. Mailing Address Line 2
 - c. Mailing City
 - d. Mailing State
 - e. Mailing Province
 - f. Mailing Zip
 - g. Mailing Country
 3. Standard Report Fields
 - a. Payment Date
 - b. Payment Amount
 - c. Payment Type
 4. All Custom Fields > All Custom Fields > Custom fields
 - a. Fund

- b. Constituency
 - c. Product, auction Item, or event entry fee
 - d. Appeal
 - e. Tributes and Memorials
 - f. Tributee First Name
 - g. Tributee Last Name
 - h. Acknowledgee First Name
 - i. Acknowledgee First Name
 - j. Acknowledgee Address
 - k. Acknowledgee City
 - l. Acknowledgee State
 - m. Acknowledgee Province
 - n. Acknowledgee Zip
 - o. Acknowledgee Country
 - p. Communications
 - q. Anonymous Donor
- ii. **Note:** Make sure to always sort the columns the same to match the import. Column sort options are the blue button to right of the Selected Columns.
- iii. Click **Save and Next**

Choose Data - Payment Details Report

Select the fields for your report, and group them.

[Save and Next](#) [Finish](#) [Cancel](#)

Choose Data

Properties

Choose Data

- ☐ [I am a/an]
- ☐ [If you are a transplant professional, at which hospital or clinic do you work]
- ☐ [Other, how did you hear about us]
- ☐ [Patient Name]
- ☒ [Fund]
- ☒ [Constituency]
- ☒ [Appeal]
- ☒ [Product, auction item, or event entry fee]
- ☒ [Tributee First Name]
- ☒ [Tributee Last Name]
- ☒ [Tributes and Memorials]
- ☒ [Acknowledgee First Name]
- ☒ [Acknowledgee Last Name]
- ☒ [Acknowledgee Address]
- ☒ [Acknowledgee City]
- ☒ [Acknowledgee State]
- ☒ [Acknowledgee Province]
- ☒ [Acknowledgee Zip/Postal Code]
- ☒ [Acknowledgee Country]

Selected Columns

Chosen	Sort	Group
Title	Not Sorted	<input type="checkbox"/>
First Name	Not Sorted	<input type="checkbox"/>
Middle Initial	Not Sorted	<input type="checkbox"/>
Last Name	Not Sorted	<input type="checkbox"/>
Suffix	Not Sorted	<input type="checkbox"/>
Greeting 1	Not Sorted	<input type="checkbox"/>
Company Name	Not Sorted	<input type="checkbox"/>
Email	Not Sorted	<input type="checkbox"/>
Phone	Not Sorted	<input type="checkbox"/>
Mailing Address Line 1	Not Sorted	<input type="checkbox"/>
Mailing Address Line 2	Not Sorted	<input type="checkbox"/>
Mailing City	Not Sorted	<input type="checkbox"/>
Mailing State	Not Sorted	<input type="checkbox"/>
Mailing Province	Not Sorted	<input type="checkbox"/>
Mailing ZIP	Not Sorted	<input type="checkbox"/>
Mailing Country	Not Sorted	<input type="checkbox"/>
Payment Date	Not Sorted	<input type="checkbox"/>
Payment Amount	Not Sorted	<input type="checkbox"/>
Transaction Type	Not Sorted	<input type="checkbox"/>

[Save and Next](#) [Finish](#) [Cancel](#)

- e. Define Filter

- i. Accept default values.
- ii. Click **Save and Next**

- f. Set Date Range
 - i. Select your preferred date range.
 - ii. Click **Save and Next**

- g. Select Summary Info
 - i. Accept default values.
 - ii. Click **Save and Next**

- h. Choose Delivery Method
 - i. For Output Options Select > Save the Report Configuration
 - ii. Enter – Report Name
 - iii. Select – Share Report Configuration

iv. Click **Finish**

Choose Delivery Method - Payment Details Report
When the report is run, this page defines where the report is placed for viewing.

[Finish](#) [Cancel](#)

Properties
Enter the header information into the header fields to include in your report. Check the box to include a time stamp in your report. Pick the radio button next to the delivery option you would like. Click Finish when you are ready to proceed.

Subtitle:

Prepared for:

Prepared by:

☐ Include Date and Time Stamp

Output Options

☐ View Report Immediately

☐ Email the Report Results:

☒ Save the Report Results

☒ Save the Report Configuration

Name Report (Required):

Description (Optional):

☒ Share Report Configuration with other [Users](#)

[Finish](#) [Cancel](#)

Run Report and Export

Use this procedure to run a report about payments/donations made for each supporter and patient.

1. Select **Control > Report Center > Saved Report**
2. Click on **Saved Report**
3. Click on the report name, this will take you to the report setup above. Since the configuration has been saved, the only step that needs to be configured is the date range.
 - a. Click **Set Date Range**
 - i. Select your preferred date range.
 - ii. Click **Finish** (a new window will open)

Set Date Range - Payment Details Report
Define the date range for your report. The data in your report will be within the date range.

[Save and Next](#) [Finish](#) [Cancel](#)

Properties

Date Range
Set the date range by first choosing an operator in the first drop-down list. Next, choose the type of range option in the second drop-down list. Enter a value into the empty field by typing or using the calendar function depending on the option you choose.

Date Range To Date

[Save and Next](#) [Finish](#) [Cancel](#)

4. **Select a format** to export. (Recommended format CSV.)
 - a. Click **Export**