Procedure to create a Donor Report /Export in Blackbaud Sphere

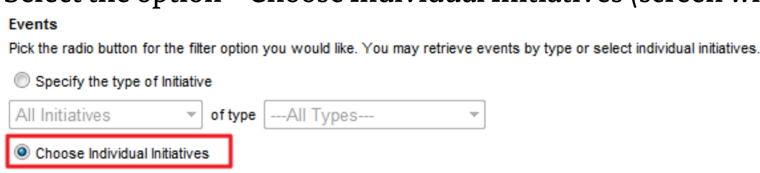
First Time Setup and Run

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

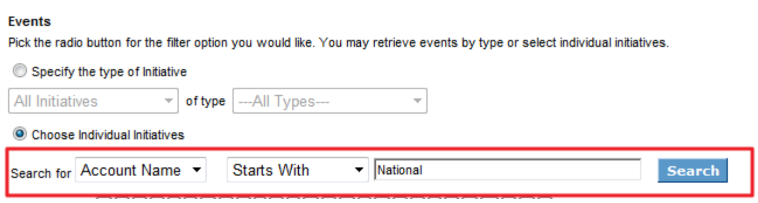
Note: This method allows you to run a single report across multiple forms/events/initiatives.

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)



        ii. Search for initiatives:



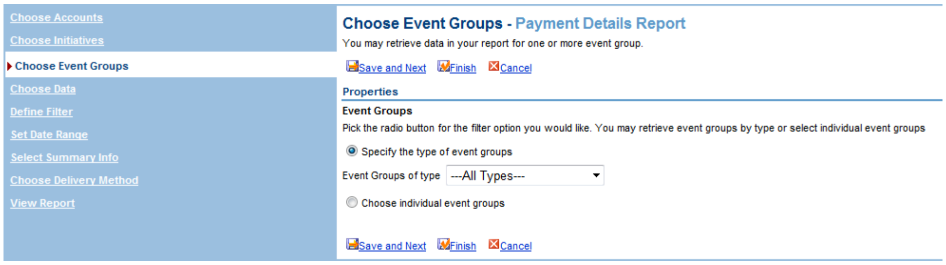
            1. *Search for – Account Name – Starts With – <<Org Name>>*
            2. Click **Search** (screen will refresh with list)
            3. Using the 'Type' column for reference , place a check next to each column where type is equal to 'Kinterthon' and 'Single Step Donation'
            4. Click the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

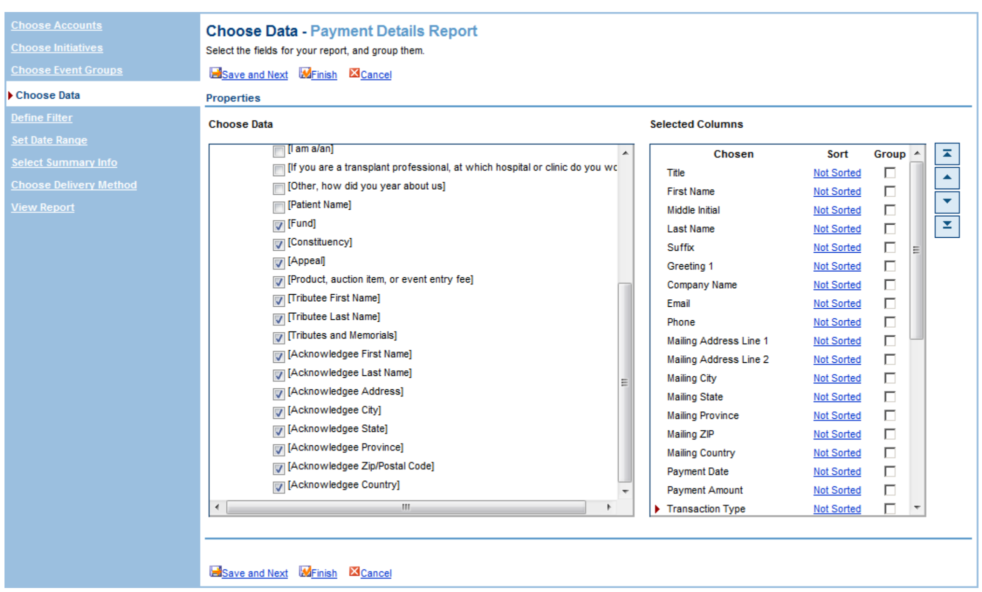
o. Acknowledgee Country

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.

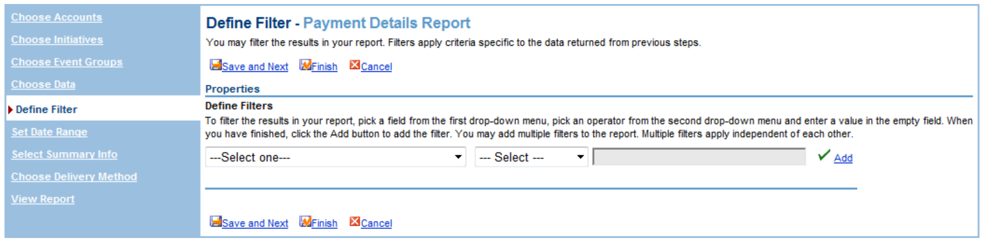
iii. Click **Save and Next**



e. Define Filter

i. Accept default values.

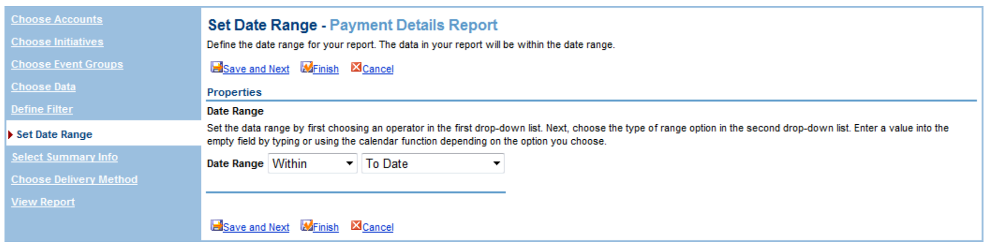
ii. Click **Save and Next**



f. Set Date Range

i. Select your preferred date range.

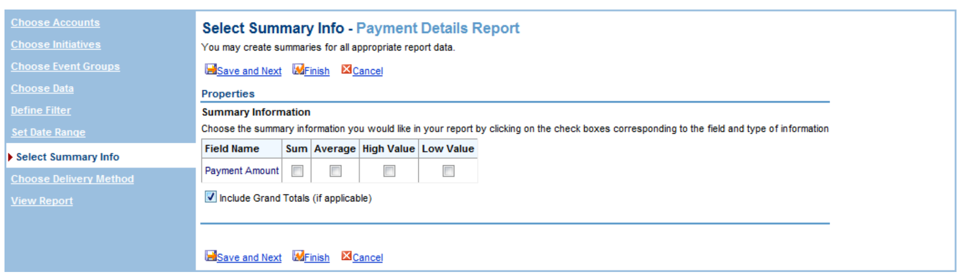
ii. Click **Save and Next**



g. Select Summary Info

i. Accept default values.

ii. Click **Save and Next**



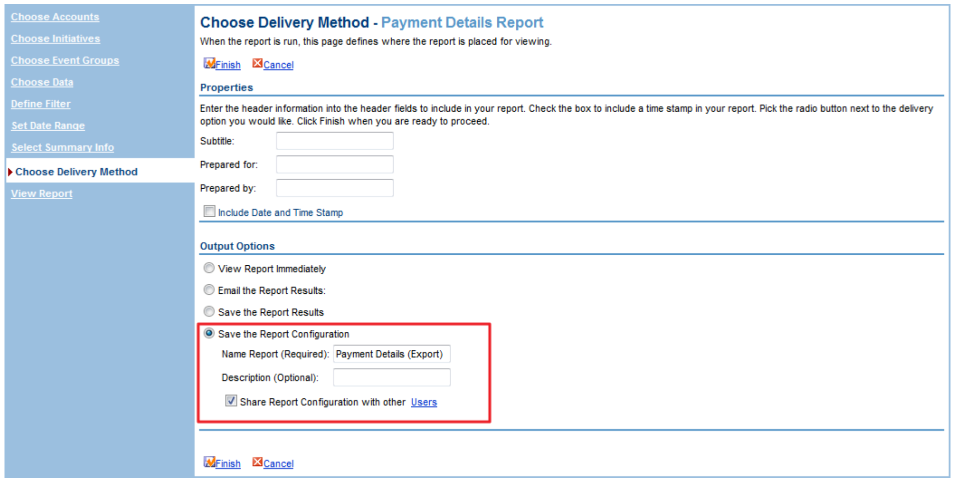
h. Choose Delivery Method

i. For Output Options Select > Save the Report Configuration

ii. Enter – Report Name

iii. Select – Share Report Configuration

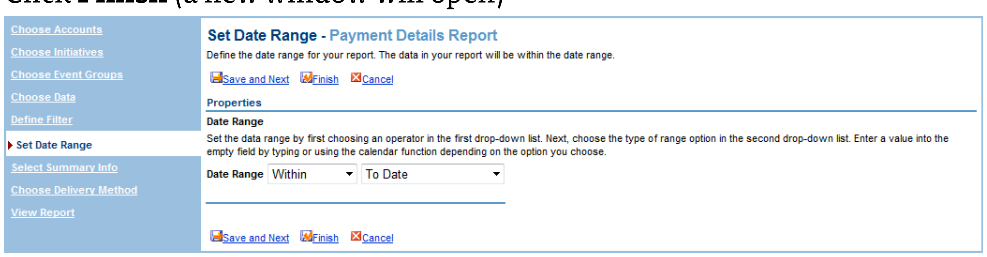
iv. Click **Finish**



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)



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