Qgiv Donations

The purpose of this report is to get a list of donations given to standard Qgiv forms. Each row in the report represents a donation transaction & its related details (GiftAssist and restrictions get their own line).

## Use Case(s)

* Quickly viewing all Qgiv donations
* Filtering and viewing donations based on forms, restrictions, etc.
* Viewing what donation forms are most popular for an organization

## Filters

|  |  |
| --- | --- |
| **Filter** | **Description** |
| Forms | Form Name(s) |
| Form Tags | Forms attached to one or more form tags |
| Restrictions | Restriction Name(s) |
| Custom Fields | Custom Fields under the organization’s forms |
| Dedication Fields | Dedication Fields under the organization's forms |
| Dedications | Dedication Type (e.g. In honor of, In memory of) |
| Source | (Public Form, Mobile Donation Form, Facebook Donation Form, Virtual Terminal, Mobile VT, SMS, Peer-to-Peer, Kiosk, Givi) |
| Donation Methods | (Online, Offline) |
| Donation Types | (Donation, Gift Assist, Event Donation) |
| Frequency | (One Time, Weekly, Every 2 Weeks, Monthly, Quarterly, Semi-Annually, Annually) |
| Giving Plans | Form Giving Plans set up by an organization |

## Web-Based Columns

|  |  |
| --- | --- |
| **Column** | **Description** |
| ID | Transaction ID |
| Date | Transaction date |
| Form | Form name |
| Name |  |
| Restriction/Event | Donor name |
| Method | Restriction name or Qgiv Event name or “Gift Assist” |
| Amount | Payment Method (e.g. Visa, Discover, MasterCard, American Express, Cash, Check, E-Check, PayPal, Matching, Bill to Carrier None) |
| Status | Transaction Amount less any refunds |
|  | Transaction status (Accepted, Pending, Voided, Chargeback, Returned, Declined, Refunded, Errors, Offline) |

## Standard Download Columns

|  |  |
| --- | --- |
| **Column** | **Description** |
| Transaction | Transaction ID |
| Form Name | Form Name the donation was processed under |
| Form ID | Form ID |
| Form Type | Qgiv, Political, Peer-to-Peer, Fundraising Hub, Auction |
| Form Data Mapping | Data mapping configured for form |
| Date | Date the donation was processed |
| Time (ET) | Time the donation was processed |
| Type | Type of donation (donation, GiftAssist, event donation) |
| Donation Amount | How much was donated less any refunds (dollar amount) |
| Gift Assist | If a GiftAssist, how much was added (dollar amount) |
| Amount Name | If donating with a gift amount button, & that gift amount button had a set name, the affiliated name |
| Status | Transaction status (Accepted, Pending, Voided, Chargeback, Returned, Declined, Refunded, Errors, Offline) |
| Recurring | If a recurring donation, the recurring ID |
| Recurring Frequency | Recurring donations only |
| Recurring Data Mapping | Data mapping configured for recurring |
| Restriction | If the donation was targeted for a restriction, the name of that restriction |
| Sub Restriction | If donated to a restriction, the name of a selected sub-restriction, if applicable |
| Restriction Data Mapping | Data mapping configured for restriction |
| Dedication | If dedicated to someone, the full dedication text |
| Dedication Recipients | Recipients sent to when using the form dedication tool |
| Event Name | If donated to a Qgiv Event, the name of that event |
| Online/Offline | Online or offline donation descriptor |
| Payment Method | Transaction payment method (e.g. Visa, Discover, MasterCard, American Express, Cash, Check, E-Check, PayPal, Matching, Bill to Carrier None) |
| Payment Channel | Standard, Apple Pay |
| Last Four | Last four digits of the payment |
| Check Number | If paid with a check, the check number |
| CC Name | Name affiliated with the payment method |
| Company Donation | Indicates donation is from a company |
| Salutation | Title of donor |
| First Name | First name of the donor |
| Last Name | Last name of the donor |
| Suffix | Suffix of the donor |
| Email | Email of the donor |
| Email Data Mapping | Data mapping configured for Email |
| OptedIn | Transaction OptedIn value |
| Phone | Phone of the donor |
| Company | Company of the donor |
| Address | Address of the donor |
| City | City of the donor |
| State | State of the donor |
| Zip | Zip of the donor |
| Country | Country of the donor |
| Employer | Employer Name |
| Employer Email | Employer Email Address |
| Billing Address | Billing address of the donor |
| Billing City | Billing city of the donor |
| Billing State | Billing state of the donor |
| Billing Zip | Billing zip of the donor |
| Billing Country | Billing country of the donor |
| Anonymous | Transaction anonymous value |
| Associated Info | Any extra associated information that is relevant to the transaction (<https://support.qgiv.com/hc/en-us/articles/115006117807-Associated-Info-Parameter-Tracking>) |
| Source | Module the donation was processed under (Public Form, Mobile Donation Form, Facebook Donation Form, Virtual Terminal, Mobile VT, SMS, Peer-to-Peer, Kiosk, Givi) |
| Source ID | Identifier that works in conjunction with source for special donation sources (Designates iOS or Android for Givi, exact Kiosk ID if a kiosk, SMS short code if from SMS source, identifier for Mobile Virtual Terminal if from there) |
| Memo | Transaction memo |
| (Custom fields) | Custom form fields |

## Additional Custom Download Columns

|  |  |
| --- | --- |
| **Column** | **Description** |
| Batch Date | The batch date for the particular transaction |
| Deposit Date | The deposit date for the particular transaction |
| Total Amount | Sum of donation totals for all restrictions & one-time donations, in dollars |
| Refund Amount | If a refund occurred, the refund amount in dollars |
| Transaction Qgiv Fee | Fee for Qgiv processing, in dollars |
| Created By | The name of the entity creating the transaction (if from Web VT, the VT user logged in; if from the front-end, the front-end user logged in) |
| SMS Keyword | If donated through SMS, the SMS keyword |
| Kiosk | If donated through a kiosk, the kiosk name |
| IP Address | IP address associated with the transaction |
| Express Donate | Whether the transaction was made through Express Donate (Yes/No) |
| Donor ID | The Qgiv account ID associated with the transaction |
| Plan Name | If the donation was a plan donation, the plan name |
| Optional Registration Donation | Indicates donation was made during registration |
| Matching Transaction | ID of matching transaction |
| Matching Amount | Amount of Matching Transaction |
| Custom Field | Custom form fields |
| Dedication Field | Dedication person’s email |
| Event ID | Event ID |
| Custom Column | Adds static text to every row |