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The DonationPay Portal: Common Uses

Portal Tips and Tricks

When donors make payments on your DonationPay page(s), each transaction and associated information is reflected in the DonationPay Portal. Below, we've put together some tips on how to complete common tasks using the Portal and our staff is here to help walk you through how to use our tools to maximize your organization's fundraising efforts.

- **Pulling up a date specific list of transactions**

In the Payment History tab, click on the button on the right hand side, titled "Show Filters". After clicking the button, the filters area will drop down and give you a series of filter options. To sort by date, go into the "Date" field and enter your specific date range.

- **Pulling up transactions from a specific page**

You'll use the same process to pull up transactions from a specific page. Once you've hit the "Show Filters" button, one of the options you will see to sort by is "Account Page", type in the name in the event name and or the page name and the results will be filtered to reflect only what was received for the specific search query.

- **Finding a specific donor**

To search by a specific donor, you'll use the same process outlined above, but will enter your donors name in the "Donor Name" field.

- **Exporting a CSV file**

Once you've pulled up your desired report in the Payment History screen, you'll see a button titled "Export CSV". To export your reports in Excel format, hit that button and all filtered information you would like to see will automatically download as an Excel sheet.

- **Refunding a payment**

When refunding a payment to a donor hold the mouse over the donor name line and click to open up the donor's payment history. At the lower left hand side of the donor's history, you will find a "Refund Payment" button. Click the 'Refund Payment' button and it will allow you to input the amount you would like to refund.

- **Canceling a recurring payment**

To cancel a recurring payment, click into the "Recurring Profiles" tab. Similar to refunding a payment, hover over the donor who's recurring payment in question you would like to filter. Once you've clicked on the donor in question from there you have the option to cancel the recurring payment.