Use the staff donation overview

Read the community summary, filter transactions and open campaigns and statistics with the available permissions.

5 min · Available with the required permissions · 2026-09-22

Before you begin

- ✓ Access the staff area with View donations permission.
- ✓ Check the active community, including within a pastoral unit.

1

STEP 1 OF 4 · 1 MIN

Read the scope and summary

Open Donations in the staff area and check the selected community. The header summarises offerings for the displayed month; the cards show community indicators. Do not confuse them with your personal donation history.

Within pastoral units, this area retains an individual community’s context. If online payments are inactive, read the setup notice before looking for controls that depend on Stripe.

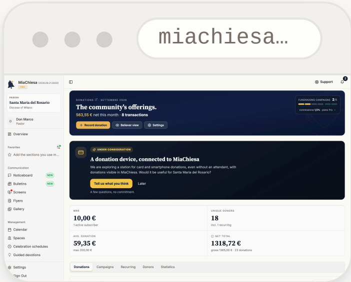

Fig. 1 The summary concerns the active community.

2

STEP 2 OF 4 · 1 MIN

Filter transactions before reviewing them

In Donations, search by name or email and use status, campaign and source filters. Completed, Pending, Failed and Refunded describe different results; do not count a pending transaction as a completed receipt.

After changing filters, wait for the list to update and check the current page. Open a row’s details to review that transaction. CSV export uses the list filters.

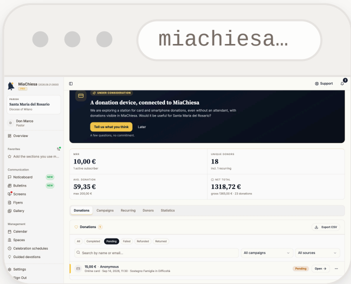

Fig. 2 The Pending filter isolates transactions that have not completed.

3 **STEP 3 OF 4 · 2 MIN**

Open campaigns for the same community

Switch to Campaigns to review fundraisers. New campaign requires campaign-management access and active online payments. Recording donations, refunds, receipts and fiscal settings require separate permissions.

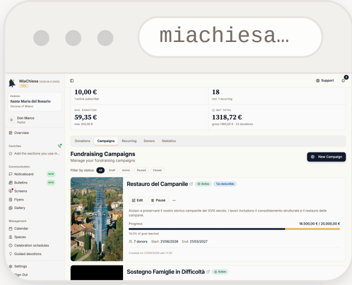

Fig. 3 The tab changes without creating or editing a campaign.

4 **STEP 4 OF 4 · 1 MIN**

Interpret statistics and other tabs

Under Statistics, check the date range, campaign and donation type before comparing results. The Donations list filters are separate from the Statistics filters.

Donors and Recurring appear only with their respective permissions. Faithful view opens the donor-facing experience; use it to check what viewers see, then return to management.

What you have achieved

- ✓ You distinguished the summary, filtered list, campaigns and statistics.
- ✓ You checked the community, status and permissions before acting.

Troubleshooting

I see Donations but not management controls ×

Visibility depends on community permissions and payment setup. An account without operational access may be routed to the faithful view. Request only the access needed for your task.