

Search Transactions

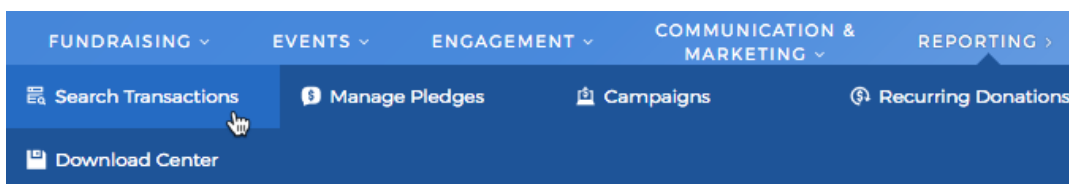
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Your organization can access donation and donor information in real-time and export a report of donations and donor information that you have collected in your various activities. You can include multiple types of donations in one report while filtering certain dates, keywords, and even the last four digits of the payment method.

To export a report of donor information:

Filter with the Report Builder

Click Reporting then Search Transactions:





Choose the Transaction Types of the donations you would like to see by selecting Credit Card, Paypal, Matching Donations, Offline or Non-Payment. You can also filter by Billing Status.

Search Transactions

Report Builder Saved Reports

Transaction Type

<input checked="" type="checkbox"/> Credit Card	<input checked="" type="checkbox"/> Paypal	<input type="checkbox"/> Matching Donations	<input type="checkbox"/> Offline 	<input type="checkbox"/> Non Payment 
<input checked="" type="checkbox"/> Collected	<input checked="" type="checkbox"/> Collected	<input type="checkbox"/> Collected		
<input checked="" type="checkbox"/> Pending	<input type="checkbox"/> Refunded	<input type="checkbox"/> Pending		
<input type="checkbox"/> Refunded				
<input type="checkbox"/> Voided				

To further filter the results, check the Date Information box and choose a date filter option or enter a custom Start Date and/or End Date.

Date Information

Today Last 7 Days Last 30 Days This Month Last Month This Year Last Year Custom

Start Date End Date

10/01/2019 04/16/2020

Under Activities, you can filter by Campaign, Keyword and Form. If you choose a specific campaign, then to further filter by a Keyword, you will only see those keywords within that selected campaign.

Activities

Campaign	Keyword	Form
<input type="text"/>	<input type="text"/>	<input type="text"/>
	Select a campaign to filter by its keywords	Select a campaign and/or keyword to filter by its forms

In Contact Information, you can look for a specific supporter by Name, Email, or Phone. You can also find them with the Last 4 on Credit Card field found in the Payment Information section below,

Contact Information

First Name	Last Name	Email
<input type="text" value="Kim"/>	<input type="text" value="Bryant"/>	<input type="text" value="Email"/>
Phone		
<input type="text" value="Phone"/>		

In Payment Information, you can filter to only show your larger donors, for example, by searching only for donations of a Minimum Amount, or a range by including the Maximum Amount.

Payment Information



Minimum Amount	Maximum Amount	Last 4 On Credit Card
<input type="text" value="\$ Minimum Amount"/>	<input type="text" value="\$ Maximum Amount"/>	<input type="text" value="Last 4 On Credit Card"/>

Click Search.

Search Results Screen

Search Criteria (click to toggle) Save Search Edit Search Export

01/01/2019 - 12/31/2019 (365 Days)

 Total Amount \$24650.00	 Transactions 123
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Search Options
Transaction Type: Credit Card (Collected, Pending), Paypal (Collected), Offline (Collected), Non Payment (Completed)

Below your Search Criteria you will find the Report you just generated. By default, it will show

- Transaction Date
- Donor Full Name
- Collected Amount
- Frequency
- Email
- Phone
- Activity Details
- Source
- Transaction

This is what you will get in your exported report.

If the information doesn't look right, such as you entered an incorrect date range or the wrong campaign, then you can click the **Edit Search** button in the upper right. Clicking this button will retain any search criteria you have entered so you can quickly change an item.

If you want to start your search over, you could just go to Reporting > Search Transactions again, or you can click the **Back to Search Transactions** breadcrumb link in the upper left to clear any search criteria you entered and start fresh.

Modify Report Data (Manage Columns)

To change the report information to download and view, click the **Manage Columns** button on the right.

Select all the information in the transactions like Address and [added Form Elements](#).

It is always recommended to add more items than you think you may need, so you can then evaluate their worth with the data showing in your reports.

The screenshot shows a 'Manage Columns' dialog box with two main sections: 'Available Columns' and 'Selected Columns'. At the top right of the dialog is a close button (X). The 'Available Columns' section has a search box with the placeholder text 'Start typing to filter columns'. Below the search box, columns are grouped under 'Account' and 'Activity'. The 'Selected Columns' section contains a list of columns that have been chosen for the report. Between the two sections are two arrows: a right-pointing arrow to move a column from available to selected, and a left-pointing arrow to move a column from selected back to available. To the right of the 'Selected Columns' list are two arrows: an up-pointing arrow and a down-pointing arrow, used for reordering the selected columns. At the bottom left is a 'Select All' button, and at the bottom right is a blue 'Save and Apply' button.

Available Columns	Selected Columns
Account Account Account ID Account Plan Account Plan Price Fee Rate NPO Name Parent Name	Transaction Date Donor Full Name Collected Amount Frequency Email Phone Activity Details Source Transaction Status
Activity Campaign name Form Form ID Form Name Form Payment Type Form Type Keyword Shortcode	

Select the fields you'd like in your report using the right and left arrows. If needed, change the order of selected items using the Up and Down buttons.

The Available Columns are grouped to make finding the desired fields easier. Any user generated fields that have been added to your forms from the [Add Form Elements](#) options will be listed at the bottom of the list.

You can also search for the desired field by typing its label in the search box at the top.

Next, click **Save and Apply**.

The columns at the bottom of the Search Results screen will show you your updated columns.

Exporting your Report

On the Search Results page, once you have your desired columns selected, click the Export button in the upper right. A **CSV spreadsheet** containing requested information will download within about 30 seconds in your browser.

If the report is very large or possible other reasons why it would take longer than thirty seconds to process and download, the report will be queued. It will let you know it is taking longer, and when ready, you can download it from Reporting > Download Center.

For extra information and specific reporting options for Crowdfunding and Peer-to-Peer Fundraising, [click here](#).

CRM Import Process

1. Download and open the Excel CSV file from your MobileCause export.
 2. Sort and organize relevant columns.
 3. Import relevant fields into your CRM.
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