Search Transactions

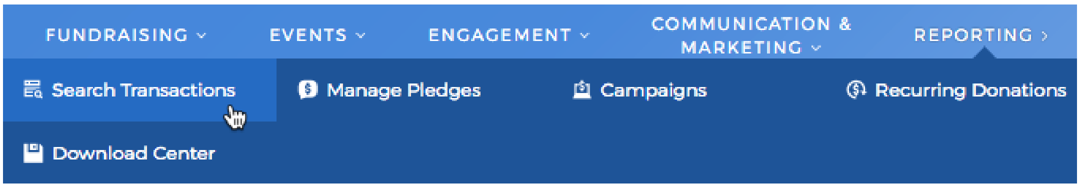
Last Modified on 05/20/2022 5:08 pm PDT

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.

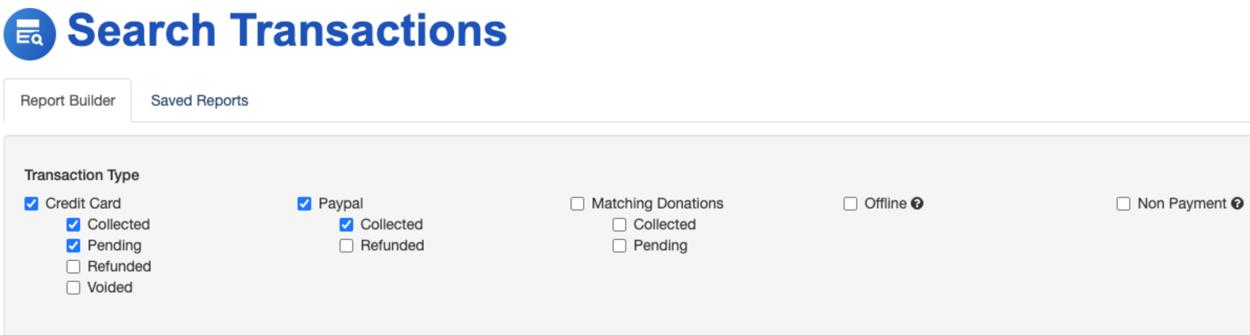
To export a report of donor information:

Filter with the Report Builder

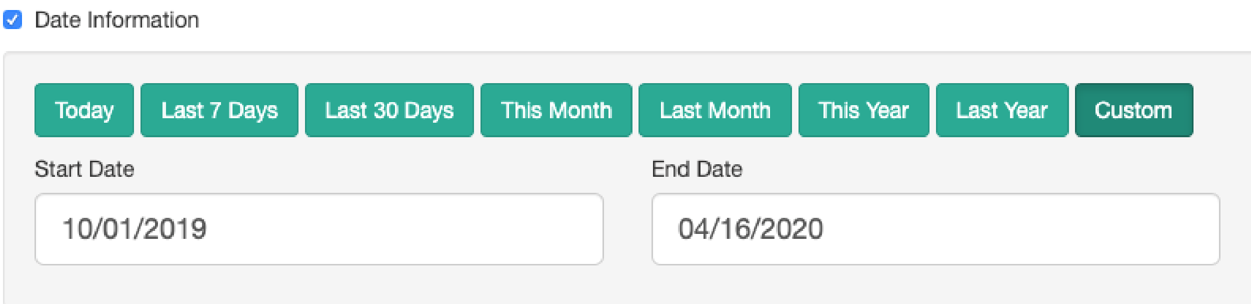
Click **Reporting** then **Search Transactions:**



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**.

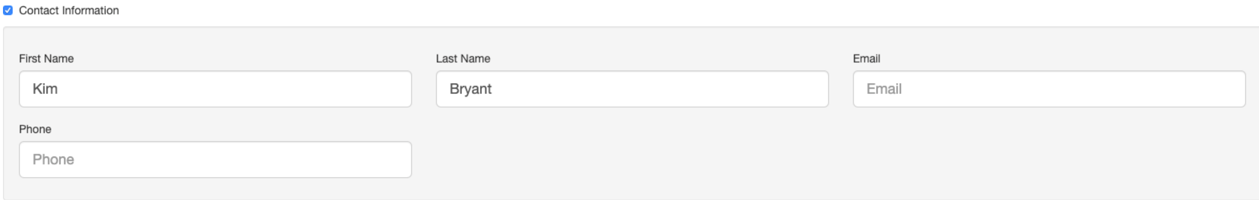


To further filter the results, check the **Date Information** box and choose a date filter option or enter a custom **Start Date** and/or **End Date**.

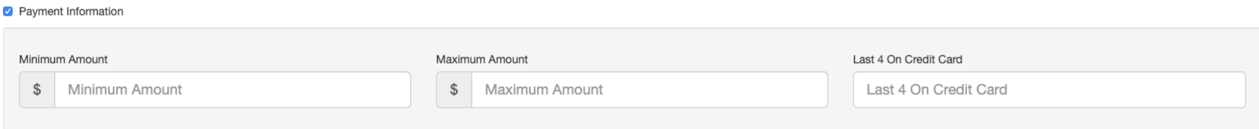


Under **Activities**, you can filter by Campaign, Keyword and Form. If you choose a specific campaign, then to further filter by a Keyword, you will only see those keywords within that selected campaign.

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,**

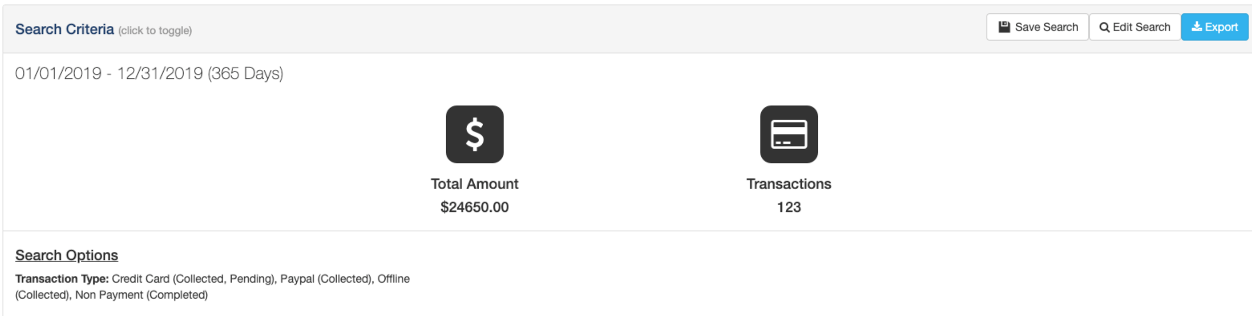


In Payment Information, you can filter to only show your larger donors, for example, by searching only for donations of a **Minimum Amount**, or a range by including the **Maximum Amount**.



Click **Search.**

Search Results Screen



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.

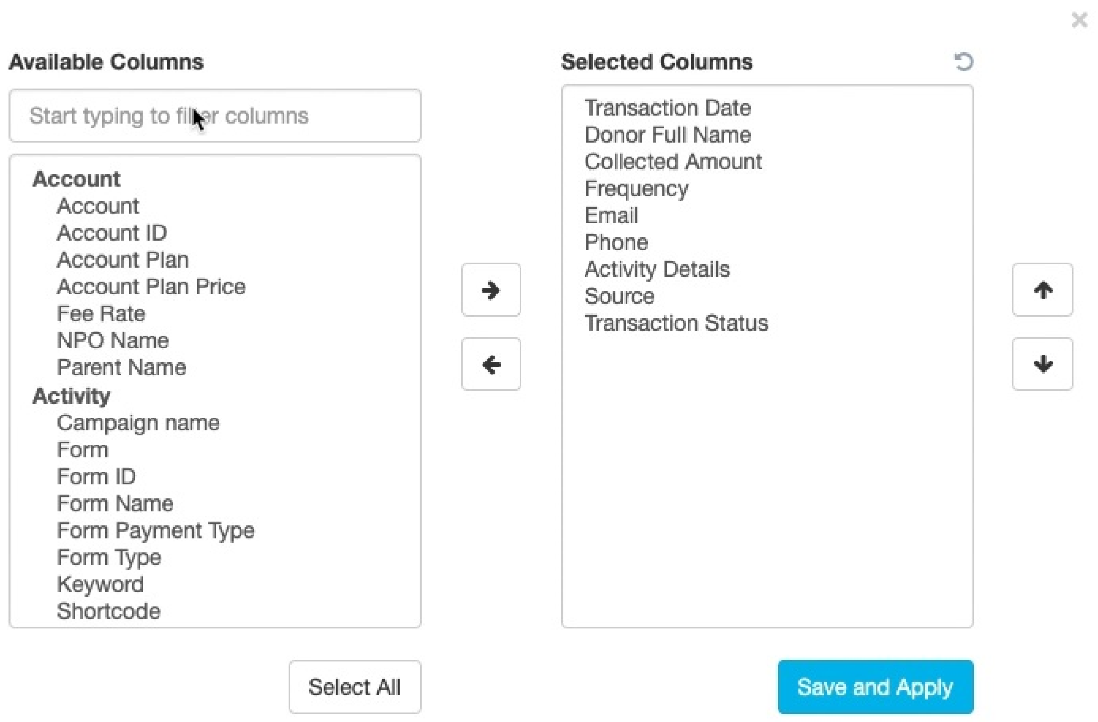
If you want to start your search over, you could just go to Reporting > Search Transactions again, or you can click the **Back to Search Transactions** breadcrumb link in the upper left to clear any search criteria you entered and start fresh.

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.



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.