Search Transactions Report

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Watch a (2:13) video tutorial on Searching Transactions

Search Transactions, from the *Transactions* menu, is a powerful tool to help you locate specific transactions.

- ⭐ Choose from more than 20 filters (Search Criteria) to drill down to the transactions you are looking for
- ⭐ Edit multiple transactions at once from the search results

Search Criteria

There are many filters available in Search Transactions. By default, aka run 'as-is', the search will include all non deleted transactions for the current date. This will be the largest number of transactions because no filters have been applied. With each filter you select, fewer results will be returned.

Along with the filters you can use to search all transactions, there are also Search Criteria options that allow you to search specifically for transactions for a specific family, student, or class.

Examples of Possible Searches

You would like to determine who your 'top earners' are for the second half of the calendar year.

To locate these families use the following filters:

- *Transaction Date from* and *through* to select July to December transactions
- *Special Search > Top 250 Customers By Date Range* to find the families who have the highest paid fees during that period

You want to edit the notes that were automatically added to the batch of tuition fees you posted

today.

To locate these transactions use the following filters:

- *Transaction Date from* and *through* to select today's transactions (default is current date)
- *Type = Tuition Fee (Debit)* to drill down to just the tuition fees

The Search Results

The search results display can be customized with the ability to show or hide columns of information, sort columns, or modify column width.

Use the checkboxes in the *Edit All* column to select the transactions you would like to edit or select the checkbox in the column header to choose all transactions. See **Edit Transactions** for more information on the edit process.