

# Search Transactions Report

Last Modified on 08/30/2022 1:53 pm EDT

[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 Rangeto* 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.

### Search Transactions

← RETURN

6 transactions have been selected to edit.

6

selected

✎

**Legend**  
  FEE/CHARGE  
  PAYMENT/CREDIT  
  UNPAID FEE  
  UNAPPLIED CREDIT

View 1 - 12 of 12
Print
Export
Refresh
17 columns hidden
Show/Hide Columns
Save Columns
Restore Columns

				Date	Type	Amt	Family/Acct	Note ↕ 1	Student	Class/Event	Edit All
				12/1/2019	Tuition Fee	67.33	Ager	December, Multi-Student Disc=3.38	Dani Ager	Hip Hop L2 - Thurs 7pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	56.11	Ager	December, Multi-Student Disc=2.81, Base Fee=45.00	Barbie Ager	Tap L1 - Mon 6pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	82.04	Zackmann	December, Multi-Class Disc=6.25, Base Fee=67.50	Cindy Zackmann	Tumbling L2 - Mon 6pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	88.60	Owers	December, Base Fee=67.50	Ashlee Owers	Tumbling L2 - Mon 6pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	59.06	Evans	December, Base Fee=45.00	Shawna Evans	Tap L1 - Mon 6pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	59.06	Xanders	December, Base Fee=45.00	Liam Xanders	Tap L1 - Mon 6pm	<input checked="" type="checkbox"/>
				12/1/2019	Tuition Fee	70.88	Ager	December	Dave Ager	Hip Hop L2 - Thurs 7pm	<input type="checkbox"/>
				12/1/2019	Tuition Fee	89.25	Dierksen	December	Cindy Dierksen	Artistic Gymnastics L3 - Thurs 7pm	<input type="checkbox"/>
				12/1/2019	Tuition Fee	70.88	Harding	December	Coreen Harding	Hip Hop L2 - Thurs 7pm	<input type="checkbox"/>
				12/1/2019	Tuition Fee	89.25	Newman	December	Levi Newman	Artistic Gymnastics L3 - Thurs 7pm	<input type="checkbox"/>
				12/1/2019	Tuition Fee	89.25	Unger	December	Olivia Unger	Artistic Gymnastics L3 - Thurs 7pm	<input type="checkbox"/>
				12/1/2019	Tuition Fee	70.88	Zackmann	December	Cindy Zackmann	Hip Hop L2 - Thurs 7pm	<input type="checkbox"/>
						892.59					<input type="checkbox"/>