

Search Transactions

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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.
- ★ Quickly locate ePayment transactions including declined payments with [Declined Reason Codes](#).

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 and see the

ePayment details posted in January 2021.

To locate these transactions use the following filters: *Transaction Date from 1/1/2021 and through 1/31/2021* to select the transactions (default is the current date).

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 check box in the column header to choose all transactions. See [Edit Transactions](#) for more information on the editing process.

Search Transactions

← RETURN

5 selected 5 transactions have been selected to edit.

Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT

View 1 - 50 of 156 Page 1 of 4 50 + Show All Print Export Refresh 14 columns hidden Show/Hide Columns Restore Columns

			Date	Type	Amt	Family/Acct	Note	Pmt Method	ePmt	Dt Paid	Student	Class/Event	Edit All
			1/20/2021	Payment	-514.00	Agar		Visa	<input checked="" type="checkbox"/>	1/20/2021			<input type="checkbox"/>
			1/1/2021	Tuition Fee	50.00	Agar	January			1/20/2021	Whitney Agar	Guitar - Hannah - Wed - 3pm	<input checked="" type="checkbox"/>
			1/1/2021	Tuition Fee	100.00	Agar	January Multi-			1/20/2021	Whitney Agar	Cheer-Team - Adv - M	<input checked="" type="checkbox"/>
			1/1/2021	Tuition Fee	50.00	Agar	January			1/20/2021	Melody Agar	Ballet - Pointe - T	<input checked="" type="checkbox"/>
			1/1/2021	Tuition Fee	125.00	Agar	January, Fee=100.00	visa		1/20/2021	Melody Agar	Ballet - Beg - F	<input checked="" type="checkbox"/>
			1/1/2021	Tuition Fee	189.00	Agar	January	Visa		1/20/2021	Melody Agar	Ballet - Pointe - W	<input checked="" type="checkbox"/>
			1/20/2021	Payment	-216.67	Ashton		Visa	<input checked="" type="checkbox"/>	1/20/2021			<input type="checkbox"/>
			1/1/2021	Tuition Fee	216.67	Ashton	January, Base Fee=200.00	Visa		1/20/2021	Toni Ashton	Tumbling - Beg - MWF	<input type="checkbox"/>
			1/20/2021	Payment	-100.00	Bailey-Skidmore		Discover	<input checked="" type="checkbox"/>	1/20/2021			<input type="checkbox"/>
			1/1/2021	Tuition Fee	100.00	Bailey-Skidmore	January	Discover		1/20/2021	Anne Bailey-Skidmore	Ballet - Foundations - Th	<input type="checkbox"/>

Click the ePayment icon to view the ePayment details.