

# Search Transactions

**Search Transactions**, located under the **Transactions** menu, is a powerful tool to help you locate fees, payments, credits, and refund 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.
- ★ Email families or export to Excel directly from the search results.
- ★ Quickly locate ePayment transactions, including declined payments with **Declined Reason Codes**.
- ★ Search within columns in the results.

**Processing multiple ePayments at once** is a time saver! You can even take it one step further and **schedule ePayments to process later**! Whether you are processing multiple ePayments now or scheduling them to be processed later, reviewing those transactions is an important step.



Permissions control the ability of your Users to see certain data and take specific actions. Search Transactions requires the *Transaction Search* permission in the *Reports* category. Learn more about [Permissions for Jackrabbit Users](#).

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## Search Criteria

There are many filters available in Search Transactions. By default, the search will include all non-deleted transactions for the current date or date range selected. Along with the filters you can use to search transactions, Search Criteria options allow you to search specifically for transactions for a specific family, student, or class.

For this example, the **Transactions Date from/through** was set for 15 days. Leave all the other Search Criteria selections blank. Click **Submit**. The grid will display all the transactions recorded for the time period selected.

## Search Results

The search results grid displays all the transactions for the timeframe. In this grid, there are 367 transactions.

- Click the **Edit Transactions** icon  (pencil in the upper right) to open the **Edit Transactions** page and make updates as needed.
  - To edit a single transaction, use the row menu icon  > **Edit** to open the **Edit Transaction** window.
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## Search Transactions

← RETURN

ALL RECORDS >

Showing 367 of 367 Transactions [HELP WITH GRIDS](#)

Legend:  Fee/Charge  Payment/Credit  Unpaid Fee  Unapplied Credit

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	DATE	TYPE	AMT	FAMILY/ACCT	NOTE	PMT METHOD	EPMT	STUDENT	CLASS/EVENT	JACKRABBIT FAMILY ID
<input type="checkbox"/>	Sep 1, 2023	Payment	0.00	Prowl	RC=3,Reason=(300) Duplicate transaction REFID:3157053862	Discover	⚠			23603398
<input type="checkbox"/>	Sep 1, 2023	Tuition Fee	75.00	Prowl	September			Danielle Prowl	Fairytale Art - T - 6:00	23603398
<input type="checkbox"/>			-75.00	Quincey		Visa	✔			23603451
<input type="checkbox"/>			75.00	Quincey	September	Visa		Lee Quincey	Fairytale Art - T - 6:00	23603451
<input type="checkbox"/>			-75.00	Skinner		Amex	✔			23603412
<input type="checkbox"/>	Sep 1, 2023	Tuition Fee	75.00	Skinner	September	Amex		Olivia Skinner	Fairytale Art - T - 6:00	23603412
<input type="checkbox"/>	Sep 1, 2023	Payment	-145.00	Clayton		Visa	✔			12936239
<input type="checkbox"/>	Sep 1, 2023	Tuition Fee	145.00	Clayton		Visa		Taylor Clayton	Tumbling 101 - T/Th - 5:00	12936239
<input type="checkbox"/>	Sep 1, 2023	Payment	-145.00	English		MC	✔			21805437



When you click one of the icons in ePayment (EPMT) column, a movable window opens with the ePayment transaction information. Place your cursor near the top of the window and click to move the window around the page.

The report results can be further customized to show or hide columns of information, sort and filter columns, or modify column width. You can send an email or print directly from the report results.

Save time and effort each time you open a grid page to view your data! After you have edited column settings and set the grid column widths, you can save the filtered data as a **Favorite**. A saved Favorite can be set as a default view and shared with other Jackrabbit Users in your organization.

Use the action icons in the upper right to work with the information in the grid.

- **Adjust Columns** - click **Adjust columns > Squeeze grid** to view the entire grid on the page.
- **Send Message** - leave the 1st column unchecked and click on the **Send Message** icon to send an email to all the contacts/families in the report. You can also use the 1st column to select a single family or group of families to send a message to. If you have **texting** enabled, you'll have the option to send a text; if you have **Jackrabbit Plus**, you'll be able to send push notifications.
- **Refresh the data** - click the **Refresh Grid** (icon) to update results in the grid if you make updates.
- **Print or Export to Excel** - click the **More** (icon) to print or export the data to Excel.

**Note:** Depending on the width of the report, reduce the size/scale of the report so all the columns print.



For additional information on working with this type of report, refer to [Work with Reports - Grid Style](#).

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