

# Advanced Search for Contributions

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## Donor Management System

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## Overview

The **Advanced Search for Contributions** lets you search for one or many Contributions based on criteria about those Contributions. You can filter and segment your Contributions based on one or more data points or find Contributions that fall within specific parameters.

Once you have Advanced Searched for Contributions, you can perform **Actions** on the records in bulk, such as:

- [Issue or re-issue](#) single or aggregate tax receipts
- [Send Donors a Thank You](#)
- [Export](#) the segmented list of contributions

## When to Use Advanced Search for Contributions?

**Example:** retrieve a list of all Contributions over \$100 that were made to a specific Campaign.

Additional examples that may call for an Advanced Search:

- All Contributions made by a **specific Contact**,
- Contributions made within a **certain period of time**,
- Contributions **under, over or between specific amounts** (e.g. between \$50 and \$100),
- Contributions made by Contacts that are members of a specific Group or have specific Tags,
- Contributions that are **allocated to one or more Funds, CH Funds or Campaign Groups**
- Contributions made **In Memory or In Honour** of a specific individual,
- Recurring Contributions (e.g. monthly gifts).

## Using Advanced Search for Contributions

1. To perform an Advanced Search for Contributions, go to the **Contributions Tab**

2. On the top right corner of the screen, select **Advanced Search** to expand the search filters

The screenshot shows the top navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail. On the right, there are links for 'Settings | Help' and a 'DMSCA DMSCA' dropdown. Below the navigation is a search bar with the placeholder text 'Search by contributor name or email' and a magnifying glass icon. To the right of the search bar, the 'Advanced Search' button is highlighted with a red rectangular box. Below the search bar, there are filters for 'Actions' (0 Selected Records Only, All 1451 Records), 'All Contributions' dropdown, 'Advanced Actions' dropdown, and an 'Add Contribution' button. A table of contributions is visible below, with columns for Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. A dark grey banner at the bottom of the table area contains the text 'Select Advanced Search'.

3. Use the available fields to input your desired search criteria. Once you have performed your search criteria, select **Search** to generate your results.

The screenshot shows the 'Edit Search Criteria' form in the 'Contributions' section. The form is organized into several sections:
 

- CONTRIBUTOR NAME OR EMAIL:** A text input field.
- CONTACT TAG(S):** A dropdown menu.
- CONTACT TYPE:** A dropdown menu with 'Any' selected.
- DATE RECEIVED:** A dropdown menu with 'Any' selected.
- CONTRIBUTION AMOUNTS:** Two input fields for 'From' and 'To'.
- TRANSACTION ID:** A text input field for 'Transaction ID'.
- CAMPAIGN GROUPS:** A dropdown menu.
- THANK YOU SENT:** A dropdown menu with 'Any' selected.
- EXCLUDE / INCLUDE BY PRIVACY OPTION(S):** Radio buttons for 'EXCLUDE' (selected) and 'INCLUDE BY PRIVACY OPTION(S)', followed by a dropdown menu.
- Additional info:** A section with a 'CH FUND' dropdown menu set to 'Any'.
- Contribution Details:** A section with 'EXCLUDE FROM TAX RECEIPTING' dropdown set to 'Any', 'FEES COVERED' dropdown set to 'Any', 'RECEIPT NUMBER' text input, and 'CONTRIBUTION NOTE' text input.
- Search and Filter Options:** A 'Search' button, a 'CONTRIBUTOR GROUP(S)' dropdown, a 'SEARCH IN TRASH (DELETED CONTACTS)' checkbox, 'CONTRIBUTION STATUS' dropdown, 'CURRENCY' dropdown set to 'Any', 'PAYMENT METHOD' dropdown set to 'Any', 'FUND' dropdown set to 'All Contributions', 'INVOICE NUMBER' text input, 'GL ACCOUNT' dropdown set to 'Any', 'CAMPAIGN' dropdown set to 'Any', 'SOURCE' dropdown, 'CONTRIBUTION RECEIPTED' dropdown set to 'Any', and 'PREFERRED COMMUNICATION METHOD' dropdown set to 'Any'.

 A red vertical line is drawn through the form, and a blue question mark icon is visible on the right side.

^ Dedication Information  
 IN MEMORY OF   
 IN HONOUR OF   
 NAME OF HONOREE   
 MESSAGE

^ Custom Question  
 CUSTOM QUESTION(S)   
 IS THERE AN ANSWER TO THE SELECTED QUESTION?

^ Recurring Contributions  
 CONTRIBUTION RECURRING?  YES  NO  
 RECURRING CONTRIBUTION   
 START DATE   
 RECURRING CONTRIBUTION   
 END DATE   
 RECURRING CONTRIBUTION   
 MODIFIED DATE   
 NEXT SCHEDULED RECURRING CONTRIBUTION   
 FAILED RECURRING CONTRIBUTION   
 RETRY DATE   
 RECURRING CONTRIBUTION   
 CANCEL DATE   
 Status   
 Payment Processor   
 Processor ID   
 Transaction ID

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4. If you wish to add additional components to your search, select **Edit Criteria** to include your new criteria, and then select **Search**.

## Advanced Search for Contributions Fields

The following will provide context on how many of the fields and features of Contributions Advanced Search can be applied to your search.

- **Contributor Name or Email:** enter full or partial information in the *Name* or *Email* fields to retrieve Contributions made by specific Contacts.
- **Contributor Tag(s):** search for Contributions made by Contacts with specific Tags.
- **Contributor Group(s):** search for any Contribution made by Contacts in specific Groups or Smart Groups.
- **Search in Trash:** search for Contributions made by Contacts that have been deleted.

- **Contribution Status:** search for cancelled, refunded, or completed Contributions here.
- **Transaction ID:** to search for a specific Contribution, search for the full transaction ID (if applicable).
- **Date Received:** the date range in which Contributions were made.
- **Payment Method:** the payment method that was used to make the Contribution. All CanadaHelps Contributions will have the prefix 'CH' to distinguish them from the payment methods made directly to your organization.
- **Source:** where the Contribution originated from. Pull a list of all CanadaHelps Contributions or all manually entered Contributions.
- **Thank You Sent:** by selecting 'Yes' you will retrieve a list of all Contributions that have been previously Thanked using the **Say Thanks** tool in the DMS. 'No' will retrieve a list of Contributions that have yet to be Thanked.
- **Privacy Options:** exclude or include one or more privacy options in your search. The resulting search will generate a Contribution list from Contacts who match the selection.
- **Campaign:** filter your search by multiple or a single Campaign. [Learn more about Campaigns in your DMS here.](#)
- **Campaign Group:** filter your search by campaigns that have previously been grouped together as a Campaign Group. [Learn more about Campaign Groups here.](#)
- **Fund:** search for DMS Manual and/or CanadaHelps Contributions designated to specific [Fund\(s\)](#).
- **CH Fund:** search for your CanadaHelps Contributions that have been designated by your donors to a specific [Charity \(CH\) Fund](#). [Learn more about CH Funds here.](#)
- **Exclude from Tax Receipting:** search only for Contributions that are marked as **Exclude from Tax Receipting**. This field is reserved for documenting non-charitable gifts that should not be receipted. After searching by this criteria, you can then perform **Actions** in bulk, such as [sending a thank you](#), rather than a tax receipt.
- **Fees covered:** if at any point within the parameters of the search, the transaction fees of a *CanadaHelps* contribution has been covered by the Contact
- **Contribution Receipted:** search for Contributions (DMS, Historic or CanadaHelps) where the "receipt number" field contains a receipt, as well as those contributions you have [actively marked as 'Contribution Receipted'](#).
- **Receipt Number:** retrieve Contributions based on the charitable Tax Receipt Number that has been issued for that Contribution (CanadaHelps or DMS issued).
- **Contribution Note:** retrieve Contributions that have a Note that matches the text entered in the field. This is a separate Note field from **Contact Notes**.
- **Contribution Recurring:** retrieves Recurring Contributions (e.g. monthly donations).
- **Dedication Information:** Select **Yes** to retrieve Contributions made In Memory or In Honour. Enter the name of the Honoree if you wish to retrieve all Contributions dedicated to a certain individual. And use **Message** to retrieve the message that the donor would have sent to accompany the tribute.
- **Custom Question:** the custom questions from your **Customizable Donation Forms** on CanadaHelps.org

will sync to your DMS. [Learn more about searching for Custom Questions and Answers here.](#)

- ***Is there an answer to the selected question?***: Once you have selected the Custom Question, select **Yes** to see all Contributions that have responded to the question or select **No** to see all Contributions that have skipped the question.
- ***Recurring contributions***: search for all Contributions marked as Recurring, either from CanadaHelps (CH Monthly Donors) or [manually entered](#).