# Export Report for FR50

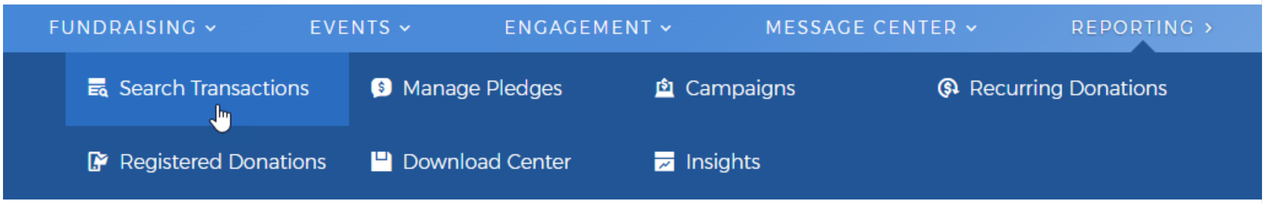
Last Modified on 09/06/2022 8:02 am PDT

The GiveSmart Fundraise reports allow you to import the information into FR50.

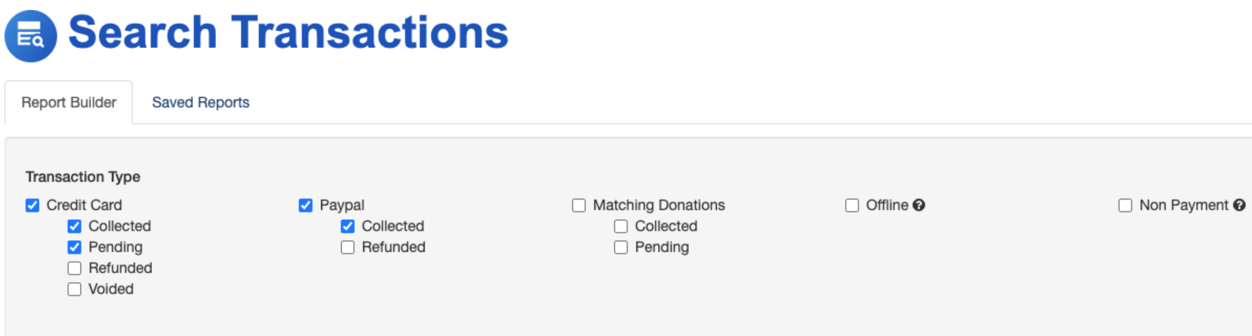
Fundraising 50 helps nonprofit organizations increase campaign effectiveness, easily measure campaign progress and deliver on your mission, all within a single system. Incorporate prospecting, donor cultivation and campaign-based fundraising with volunteer programs and other outreach efforts. For more information on FR50, click here.

## Export GiveSmart Fundraise Report

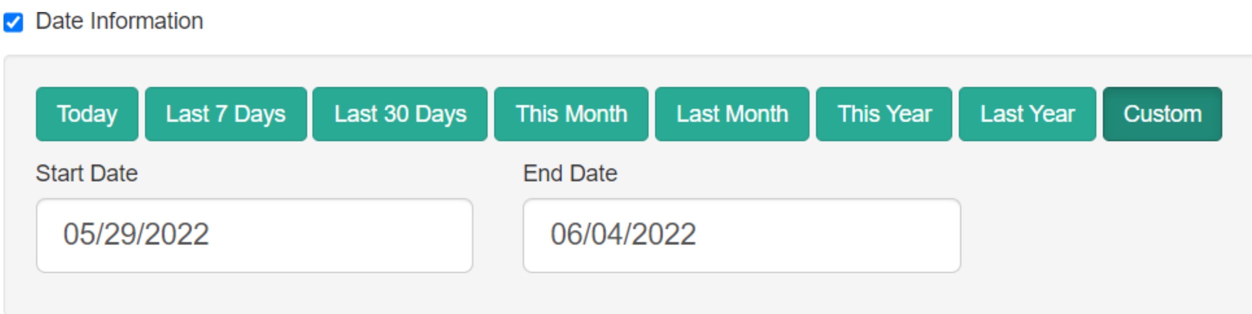
Click **Reporting** then **Search Transactions:**




Choose the **Transaction Types** of the transactions you would like to get a report on by selecting **Credit Card, PayPal, Matching Donations, Offline** or **Non-Payment.** You can also filter by **Billing Status**.

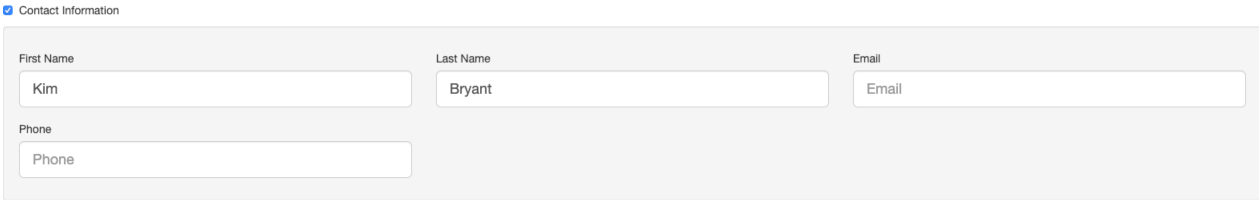



To further filter the results, check the **Date Information** box and choose a date filter option or enter a custom **Start Date** and/or **End Date**.

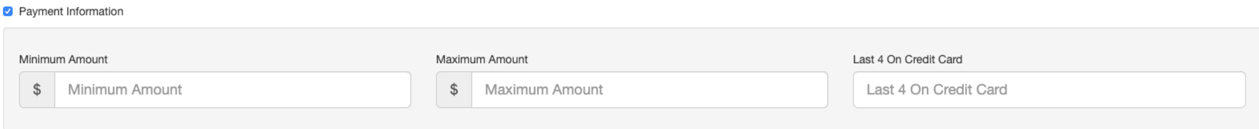



Under **Activities**, you can filter by Campaign, Keyword and Form. If you choose a specific campaign, then to further filter by a Keyword, you will only see those keywords within that selected campaign.


In Contact Information, you can look for a specific supporter by **Name, Email, or Phone. You can also find them with the Last 4 on Credit Card field found in the Payment Information section below,**

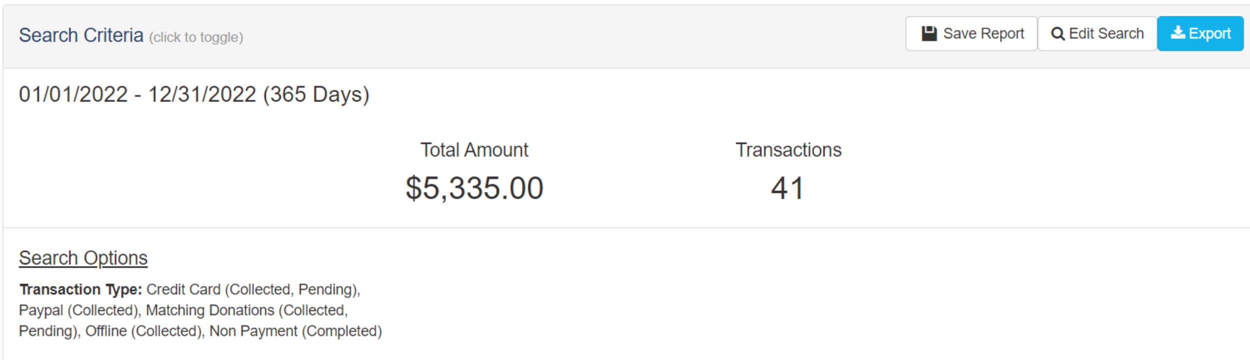



In Payment Information, you can filter to only show your larger donors, for example, by searching only for donations of a **Minimum Amount**, or a range by including the **Maximum Amount**.




Click **Search.**

# Search Results Screen




Below your **Search Criteria,** you will find the Report you just generated. By default, it will show

- Transaction Date
- Donor Full Name
- Collected Amount
- Frequency
- Email
- Phone
- Activity Details
- Source
- Transaction

This is what you will get in your exported report.

You will need to add **Transaction ID** to the report (See Modify Report Data below) before exporting your report for FR50. This ID is the unique record of the transaction in GiveSmart Fundraise so carries over as a unique item in FR50.

If the information doesn't look right, such as you entered an incorrect date range or the wrong campaign, then you can click the **Edit Search** button in the upper right. Clicking this button will retain any search criteria you have entered so you can quickly change an item.

If you want to start your search over, you could just go to **Reporting** > **Search Transactions** again, or you can click the **Back to Search Transactions** breadcrumb link in the upper left to clear any search criteria you entered and start fresh.

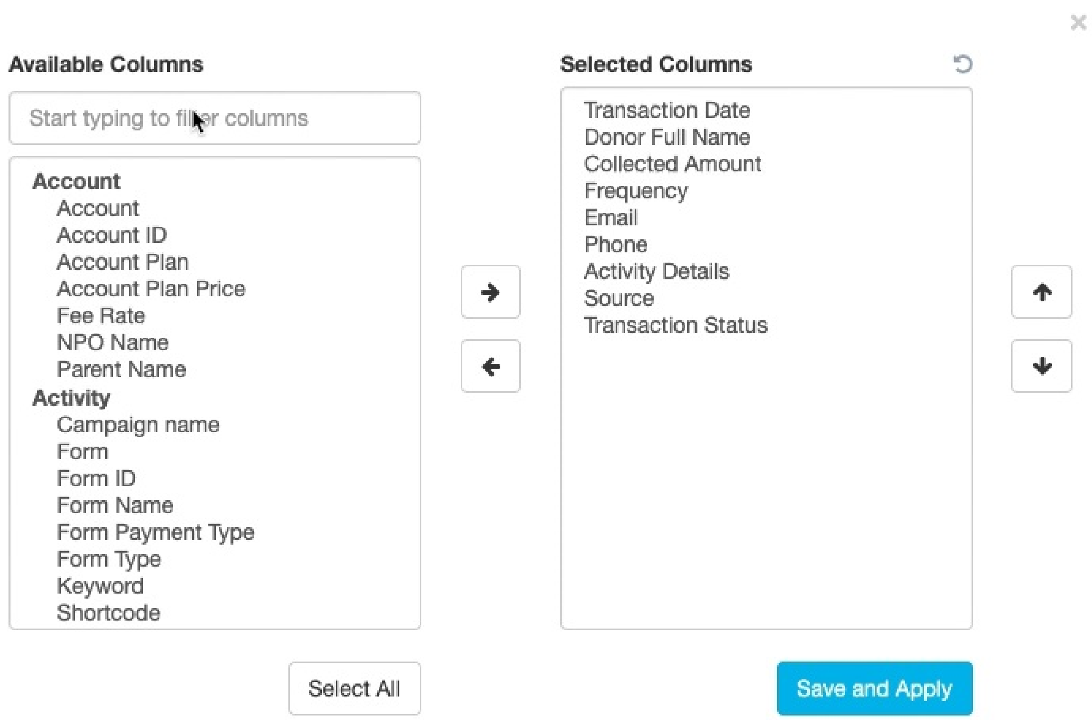
# Modify Report Data (Manage Columns)

To change the report information to download and view, click the **Manage Columns** button on the right.


Select all the information in the transactions like Address and added Form Elements.

Make sure to add **Transaction ID** under the **Payment** section to the report. This ID is the unique record of the transaction in GiveSmart Fundraise so carries over as a unique item in FR50.

It is always recommended to add more items than you think you may need, so you can then evaluate their worth with the data shown in your reports.



Select the fields you'd like in your report using the right and left arrows. If needed, change the order of selected items using the Up and Down buttons.

The Available Columns are grouped to make finding the desired fields easier. Any user-generated fields that have been added to your forms from the Add Form Elements options will be listed at the bottom of the list.

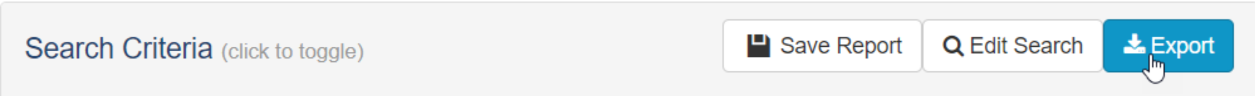
You can also search for the desired field by typing its label in the search box at the top.

Click **Save and Apply** when you have everything you need.

The columns at the bottom of the Search Results screen will show you your updated columns.

# Exporting your Report

On the Search Results page, once you have your desired columns selected, click the Export button in the upper right.




A **CSV spreadsheet** containing requested information will download within about 30 seconds in your browser.

If the report is very large or some other reason why it would take longer than thirty seconds to process and download, the report will be queued. It will let you know it is taking longer, and when ready, you can download it from **Reporting** > **Download Center**.

The name of the report will be **transaction_report_***[date and time]*_*[report ID]***.csv**

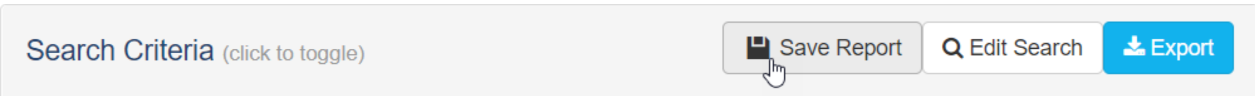
# Importing into FR50

Once the report has been downloaded, use the instructions that are found on the FR50 software, to complete the import.

# Saving Report Criteria for Later Use

Chances are, you will want to run this report multiple times to bring into FR50. Once you have confirmed everything looks correct and is importing correctly into FR50, you can save your search criteria, so you can more easily get to the report.

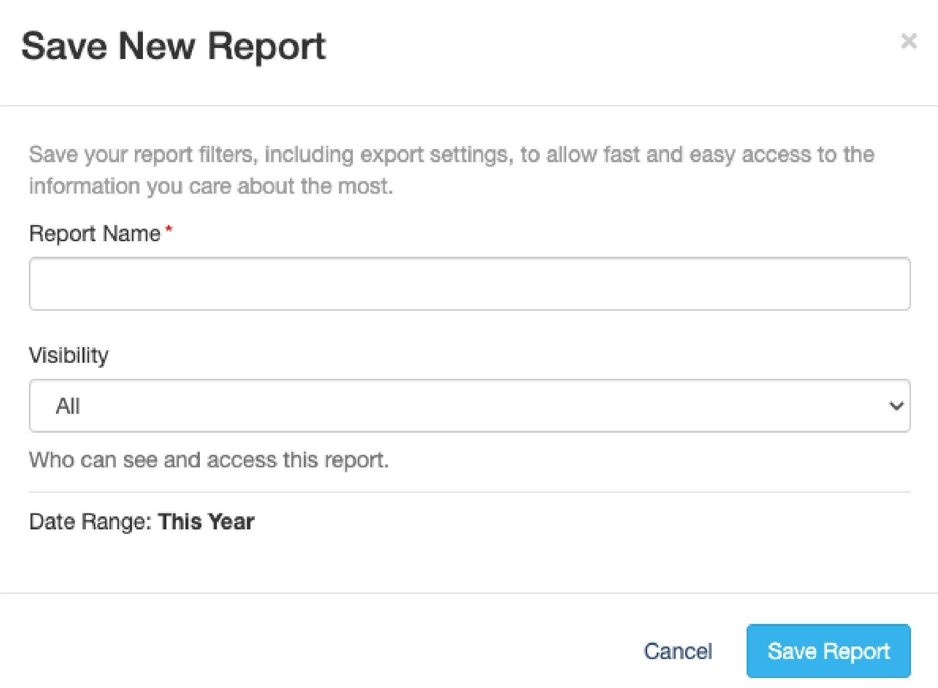
When you have a report ready for export on the Search Results screen, click **Save Report** at the top.




- **Name** the Report

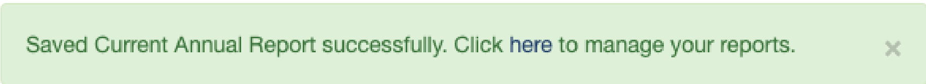
- Set the **Visibility**. You have the choice of **All** or Only Me.

In general, we recommend selecting **All**, so others on your team can benefit from your Settings/Report.



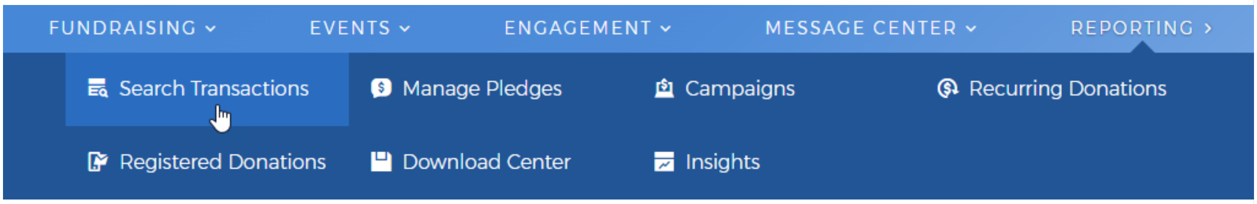

- Click **Save Report**.

If everything worked correctly, you should be alerted that your report (by name) is now saved and you can click the link to go see your various Saved Reports.

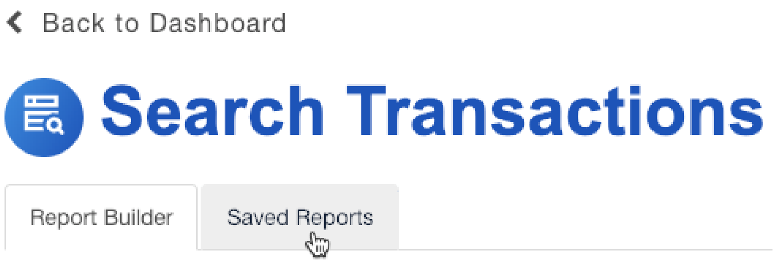



# Using Your Saved Reports

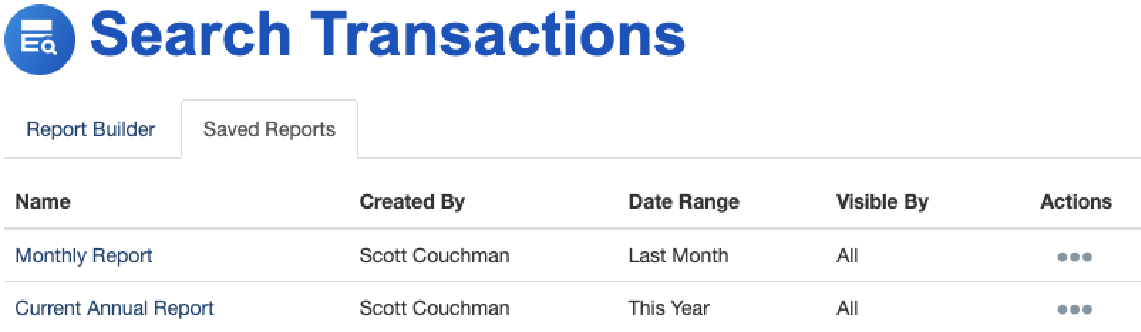
To start using your Saved Reports, you will start with the same process by going to **Reporting** > **Search Transactions**.




- Click on the **Saved Reports tab** in the upper left.

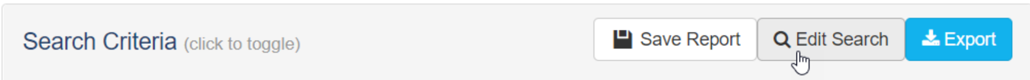



- Find the report you wish to work with.




| Name | Created By | Date Range | Visible By | Actions |
|---|---|---|---|---|
| Monthly Report | Scott Couchman | Last Month | All | ••• |
| Current Annual Report | Scott Couchman | This Year | All | ••• |

- Click the title of the Report (for example, Monthly Report) to run the report.
  - Running your report is the same as if you are filtering a new report. You will arrive on the Results screen where you can review the snapshot of information, make changes to the columns, and export the report via the Export button in the upper right.
  - You can also click **Edit Search** if you need to change any of the initial search criteria.




A common approach is to change the date range. If your report was set up with a custom date range, such as a weekly report from Sunday to Saturday, all you would need to do is:

- Run your Saved Report, by clicking on the title.
- Click **Edit Search**
- Change the Date Range to the new **Start Date** and **End Date**
- Click **Search** at the bottom
- Click **Export**

For more options using Saved Reports, click here.