

Batch Reporting for Recurring Transactions

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Note: Available to Org admins only.

Review merchant account funding details from batch reports containing **completed recurring donations** only.

Locate

1. Go to **Org Hub > Reports**.
2. Select **Recurring Transactions**.

Review

- Click on any of the headers to sort. Click the header twice to reverse sort.
- From the dropdown labeled **Show**, you have the option to show all, 10, 25, or 50 of the records.
- Select from Excel, CSV, or PDF to download or choose to Copy or Print.

The screenshot displays the 'Reports' section of a web application. On the left, there is a sidebar menu with categories: 'REPORTS', 'Disbursements' (containing 'Batch Report', 'Batch Details', 'Batch Export'), and 'Other' (containing 'Custom Report', 'Top Donors', and 'Recurring Transactions'). The main content area is titled 'Recurring Transactions' and includes a subtitle: 'Merchant account funding details from batch reports containing recurring donations only.' Below this, there is a search and display control area with a 'Show' dropdown set to 'All', a search input field, and buttons for 'Copy', 'CSV', 'Excel', 'PDF', and 'Print'. A table header is visible with columns: 'Batch Date', 'Date', 'First Name', 'Last Name', 'Cardholder Name', 'Details', 'Type', 'Last-4', 'Amount', 'Transaction', and 'Auth Code'. The table body contains the text 'No data available in table'. At the bottom of the table area, it shows 'Showing 0 to 0 of 0 records' and a pagination control with 'Previous', '1', and 'Next' buttons. A 'Total: \$0.00' is also displayed.