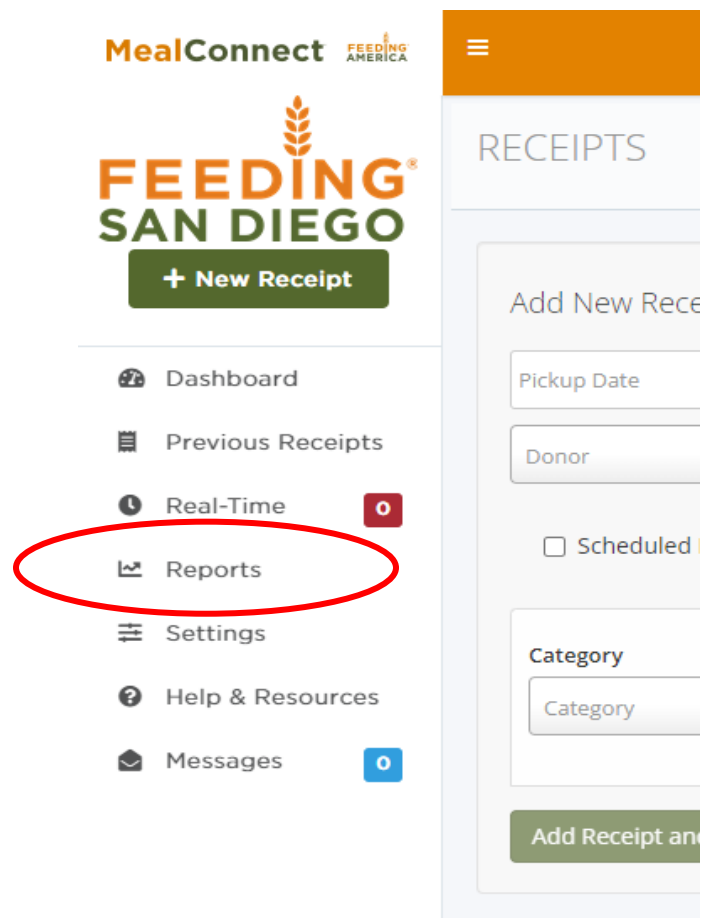# Agencies: Pulling Donation Reports in MealConnect

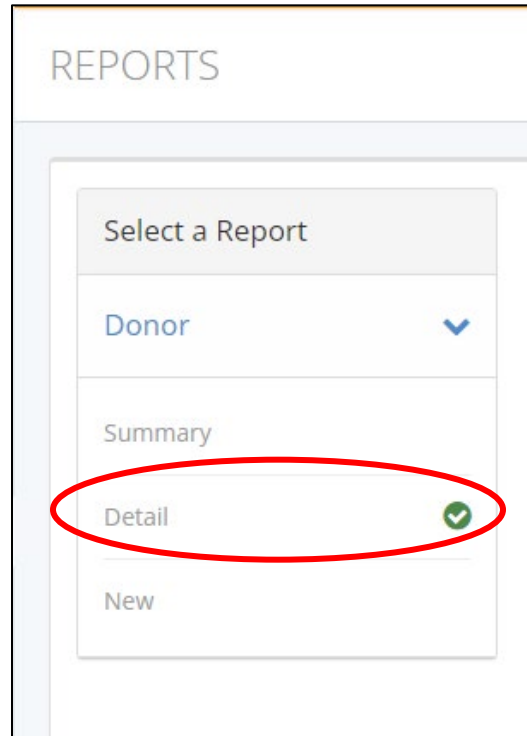**Created by**: Jacy Triboulet
Owned by: Partner Food Rescue

Created on: 10/24/2022
Revised on: 04/10/2024

Purpose: To provide step-by-step guidance on how to pull donation reports from the MealConnect platform.

1. Log into your agency's MealConnect account

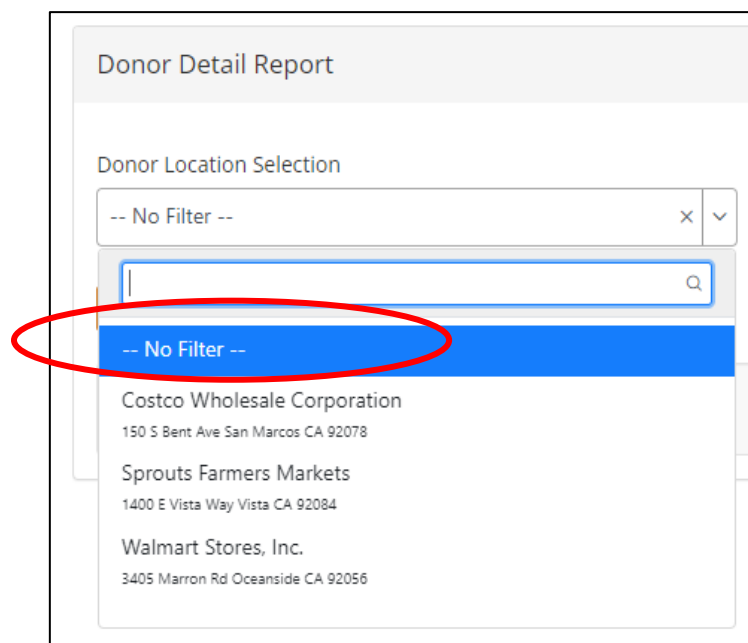2. Go to Reports (left side menu)

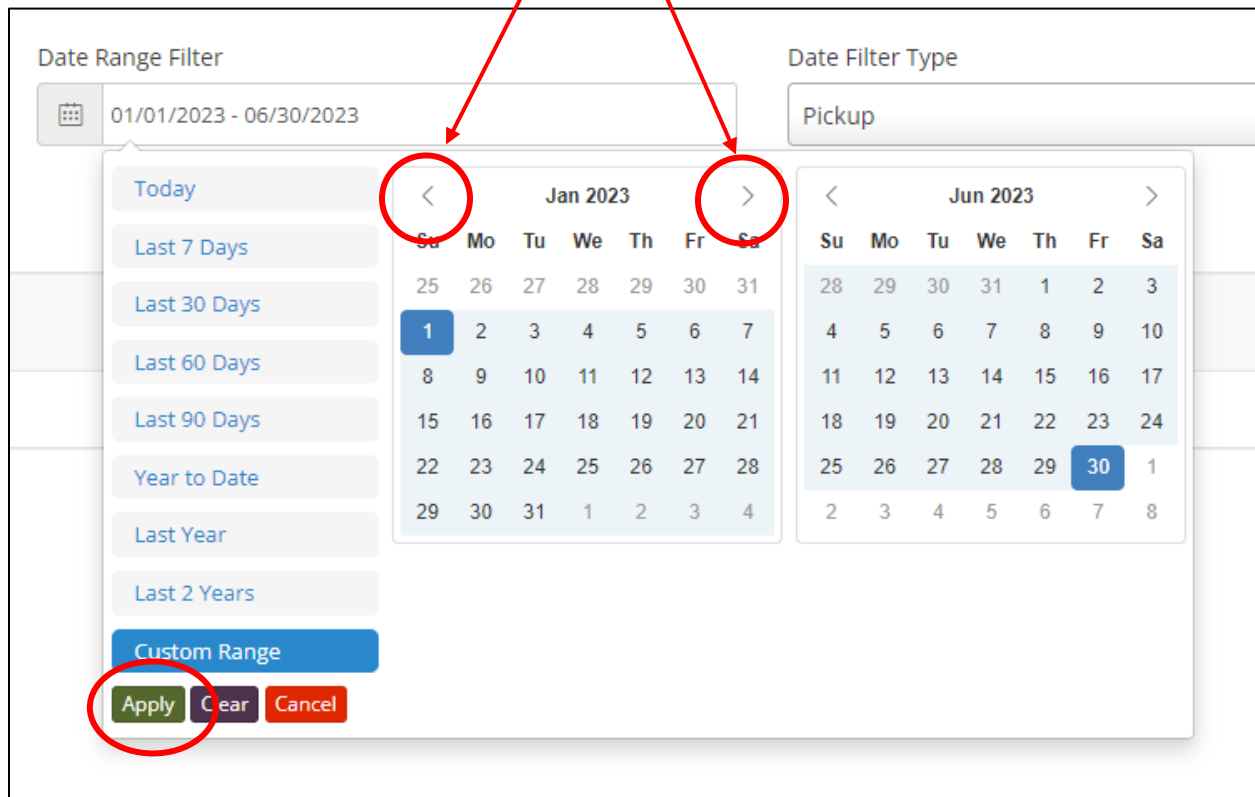3. Under Select a Report → click on "Donor" → select "Detail" (green check mark should appear):

4. **Report Filters:**
   a. **Donor Location Selection:** "No Filter" (this will capture all donors in one report); if you need pounds for a specific donor, select the donor from your dropdown menu.
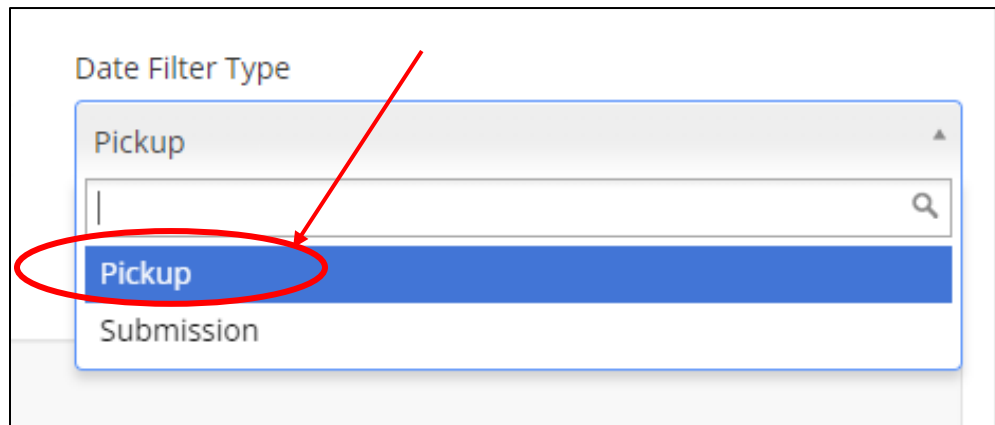
b. **Date Range Filter:** click inside the date text box and select the start date and end date for the data you need (start date and end date will show up as blue boxes). Once you have your date range selected, click "Apply"

TIP: Use the little arrows next to the month/year to navigate through the months

c. **Date Filter Type:** select "Pickup"

Once your report filters are filled out, it should look something like this:

5. When you are ready to download your report, click "Export to file" → Export File Type: select Excel from dropdown menu → Click "Export to file" (file should download automatically)
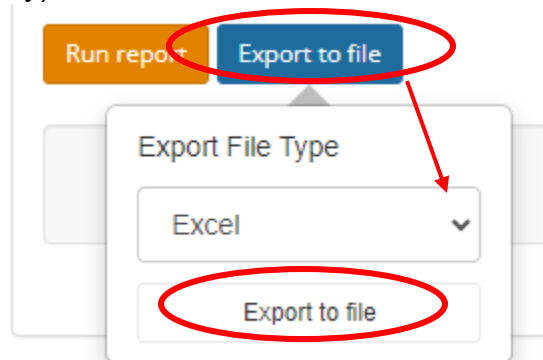

6. Open file, locate the "Pounds" section → sum up total pounds below the last line
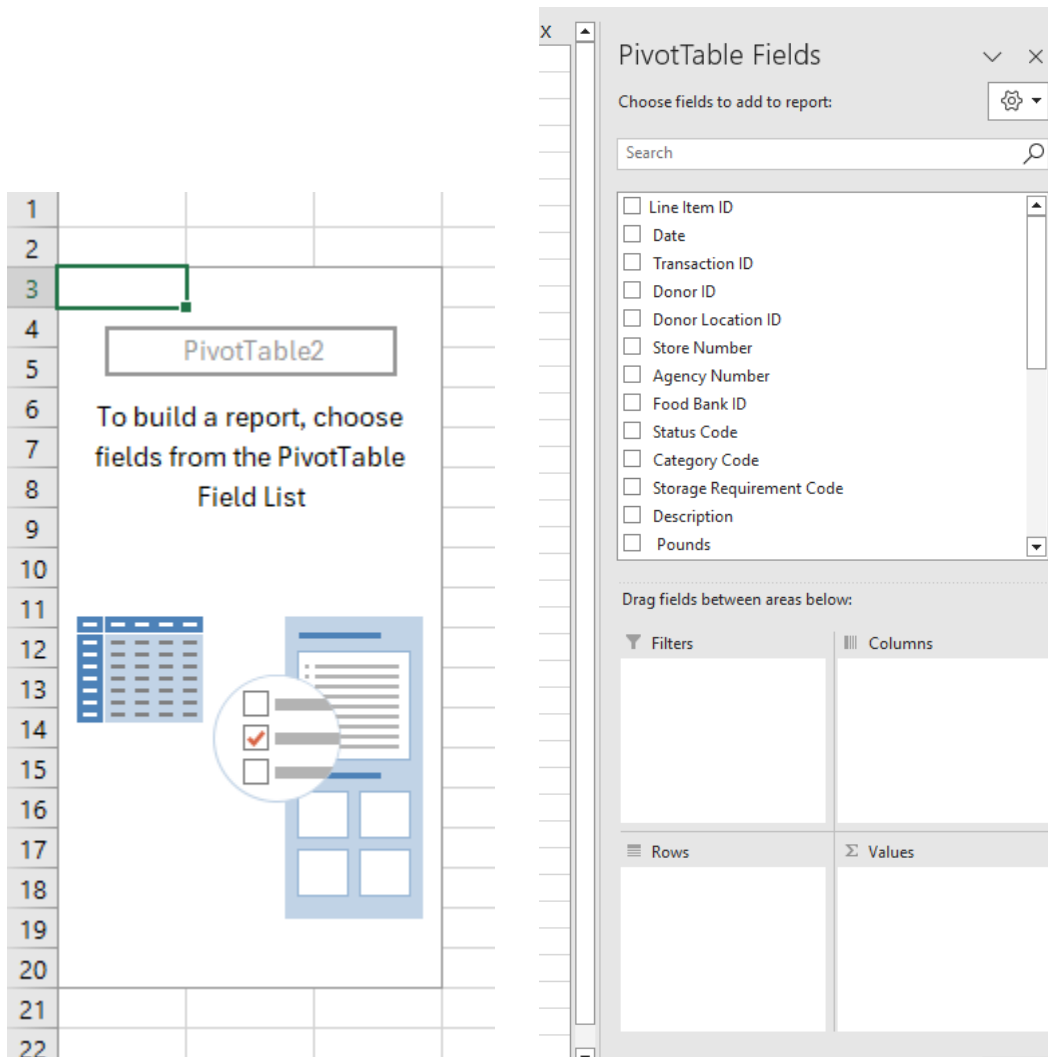   *TIP: To easily locate grand total, bold or highlight the cell!*

7. Save file → Include your agency's name and time frame in the file name.
   Example: Agency ABC Pounds Report 01.01.23 – 06.30.23

If you are pulling a report for multiple months and need monthly totals, please follow the instructions below. You may use the Example Report to follow along.

1. Highlight all your data (including section headers, but exclude the grand total)

2. Go to Insert → click on "Pivot Table" → a pop-up box will appear, hit "OK"
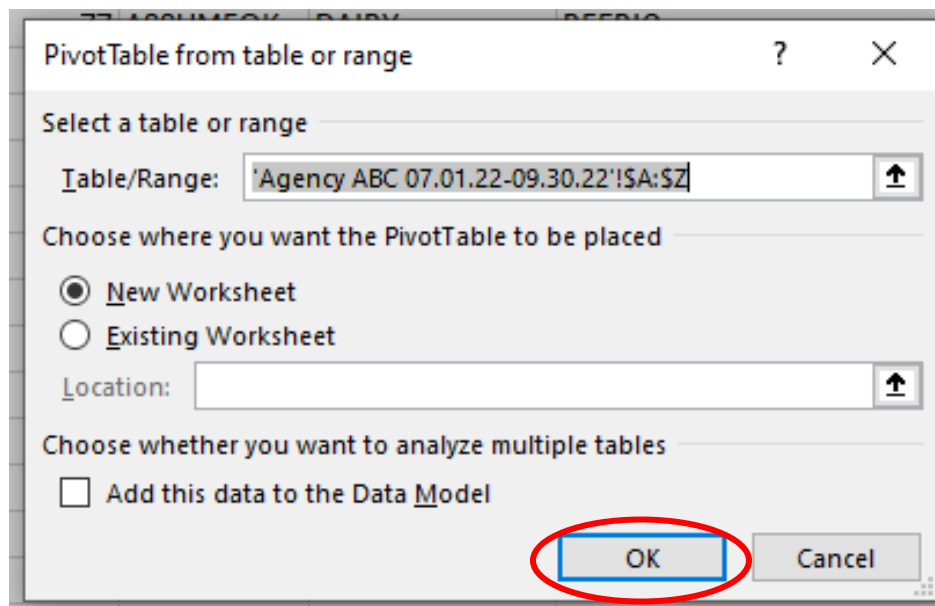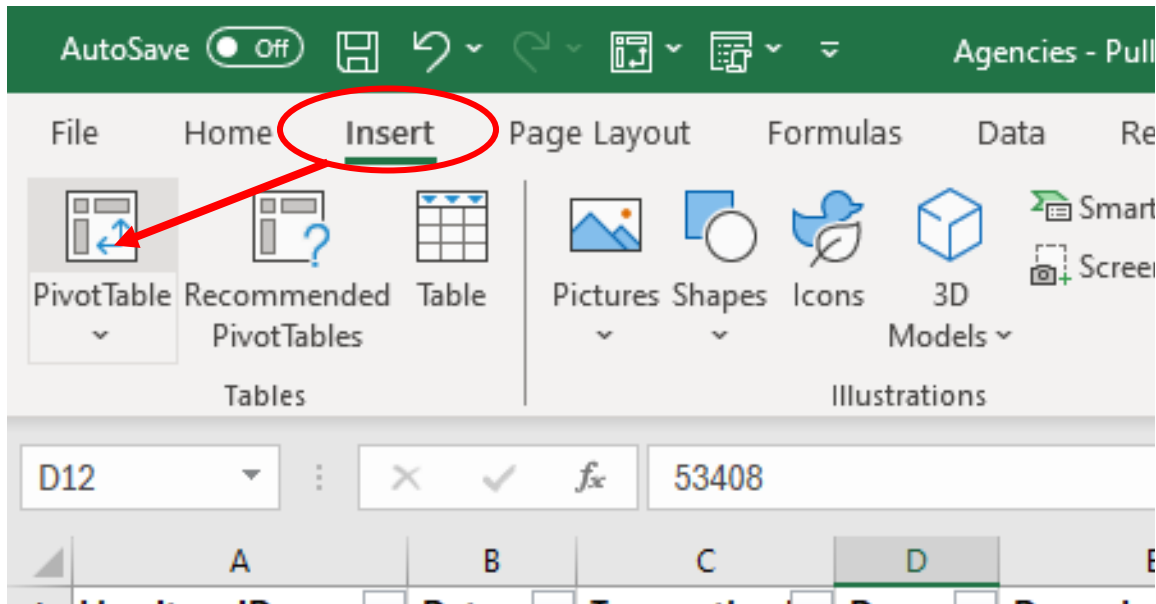
3. A different tab will open up (within the same report) and you should see a pivot table appear on the left side and the PivotTable Fields on the right (if not, click on the pivot table itself).

4. All the items listed on the PivotTable Fields represent the headers on your pounds report. We will need the following:
   a. **Rows:** Date
   b. $\sum$ **Values:** Pounds

5. You can move these items in Rows and Values by either checking the box next to them or clicking on the header and dragging it into their respective sections. It should look like this when you are done:
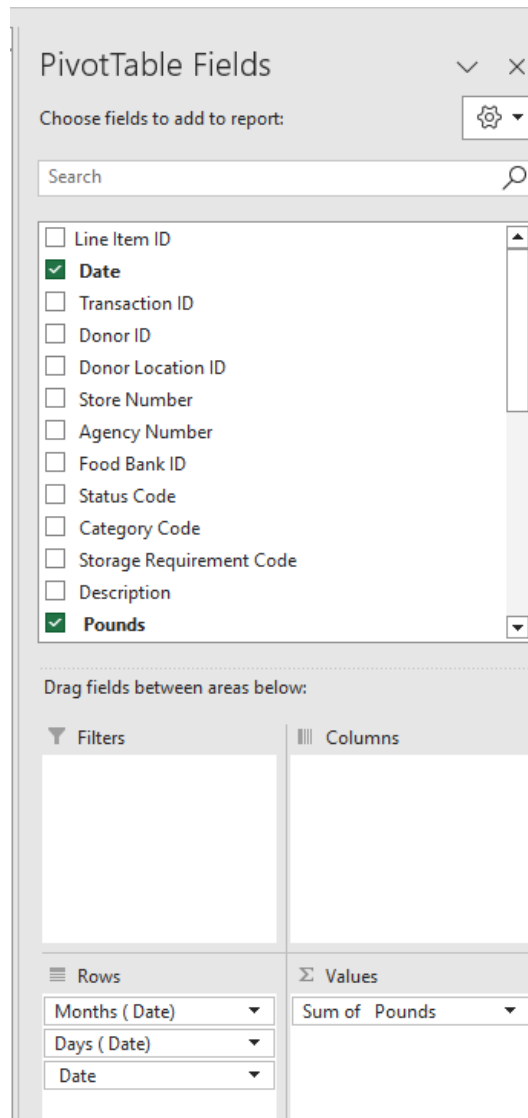
Your pivot table should now show the months and sum totals: