

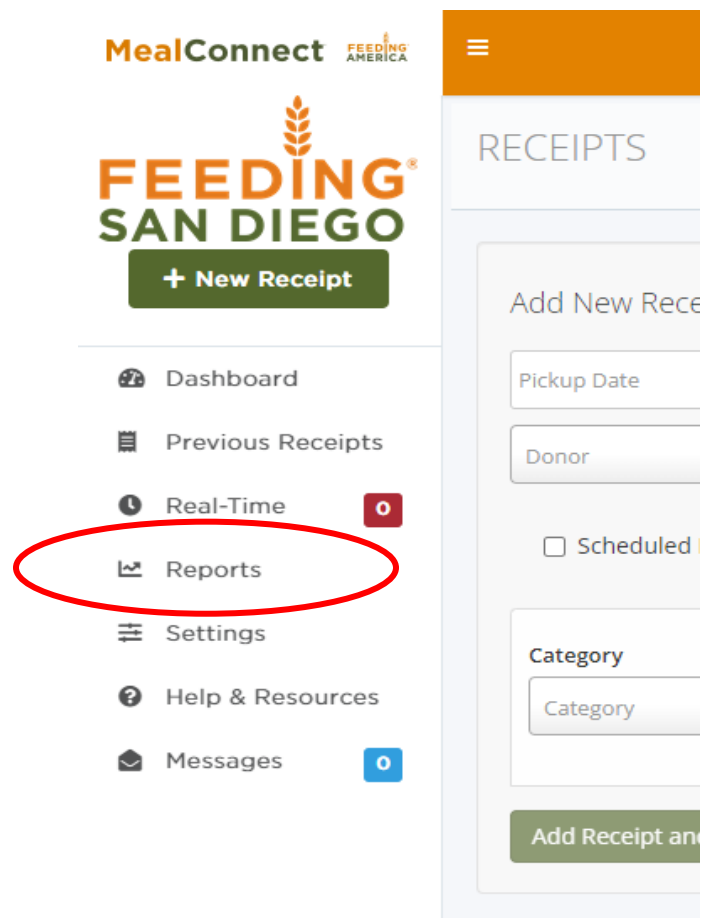
## Agencies: Pulling Donation Reports in MealConnect

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**Owned by:** Partner Food Rescue

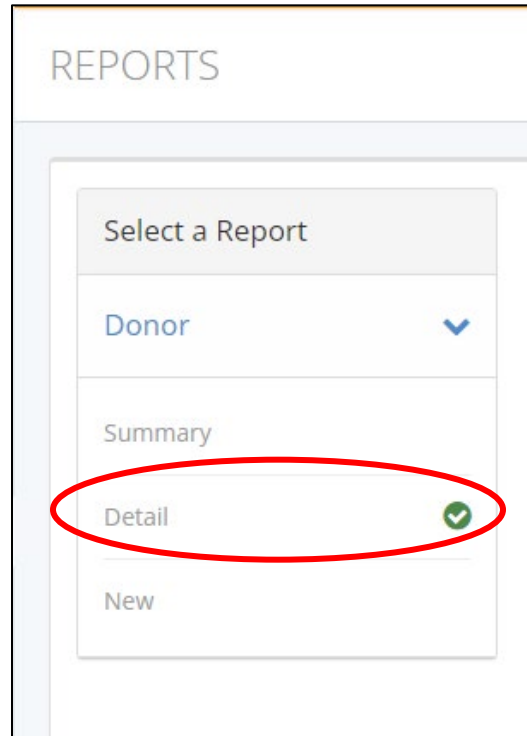
**Created on:** 10/24/2022  
**Revised on:** 04/10/2024

**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)

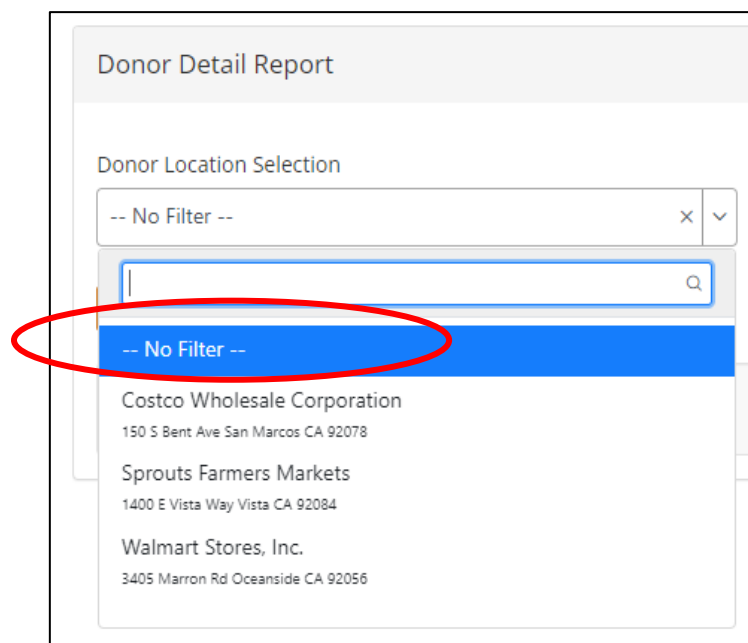


3. Under Select a Report → click on “Donor” → select “Detail” (green check mark should appear):



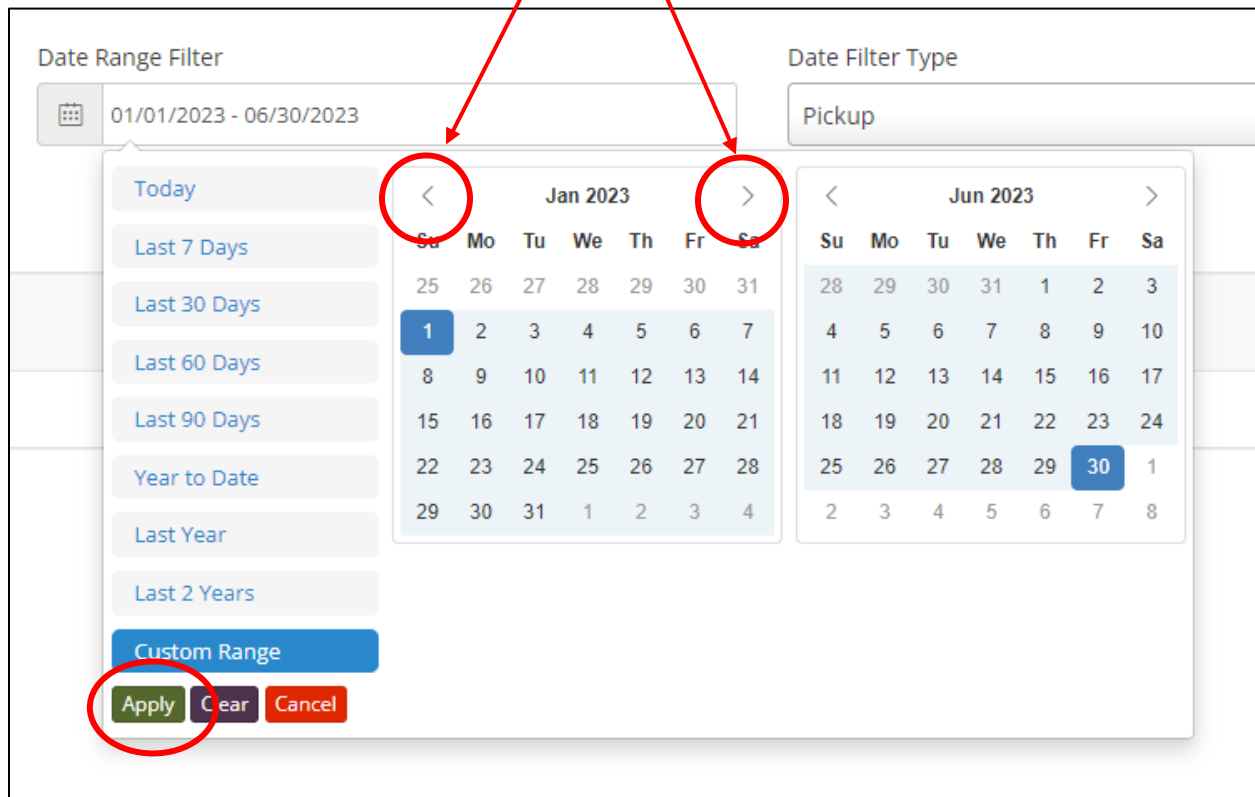
4. **Report Filters:**

- 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.



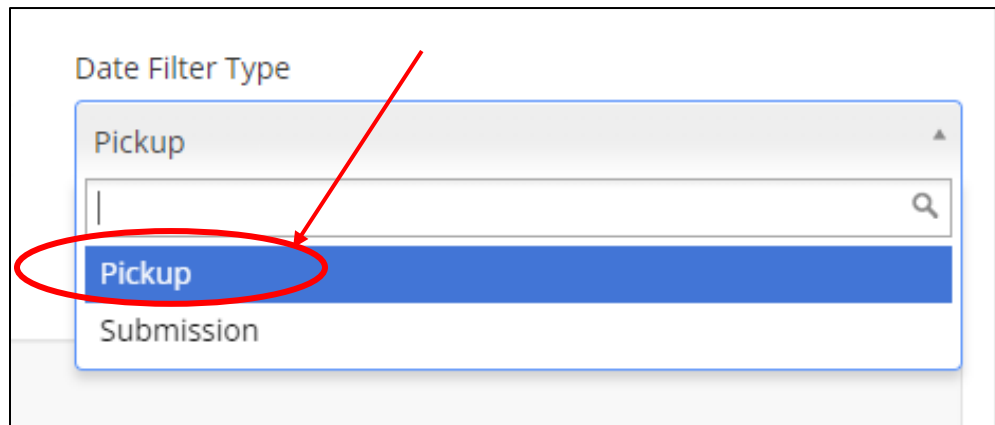
- b. **Date Range Filter:** click inside the date text box and select the start date and end date for the data you need (start date and end date will show up as blue boxes). Once you have your date range selected, click “Apply”

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



The screenshot shows the 'Date Range Filter' interface. The date range is set to '01/01/2023 - 06/30/2023'. The 'Date Filter Type' is set to 'Pickup'. The calendar shows 'Jan 2023' and 'Jun 2023'. The 'Apply' button is circled in red. Red arrows point to the navigation arrows on the calendar.

- c. **Date Filter Type:** select “Pickup”



The screenshot shows the 'Date Filter Type' dropdown menu. The 'Pickup' option is selected and highlighted in blue. The 'Submission' option is also visible. A red arrow points to the 'Pickup' option, which is circled in red.

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

Donor Detail Report

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Donor Location Selection

-- No Filter --
X
v

Date Range Filter

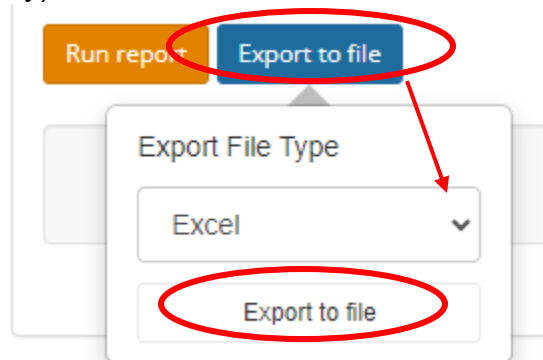
01/01/2023 - 06/30/2023

Date Filter Type

Pickup

Run report
Export to file

- 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)



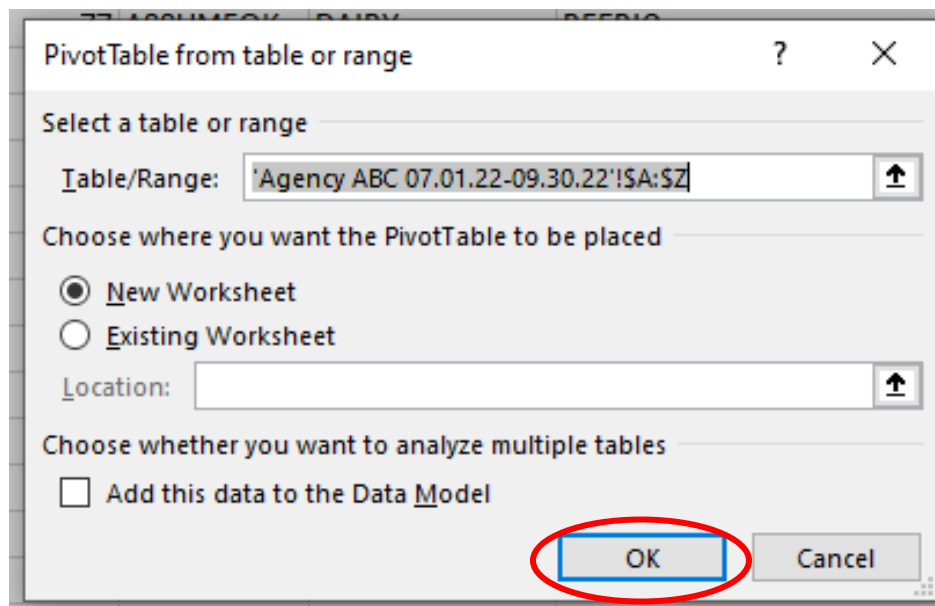
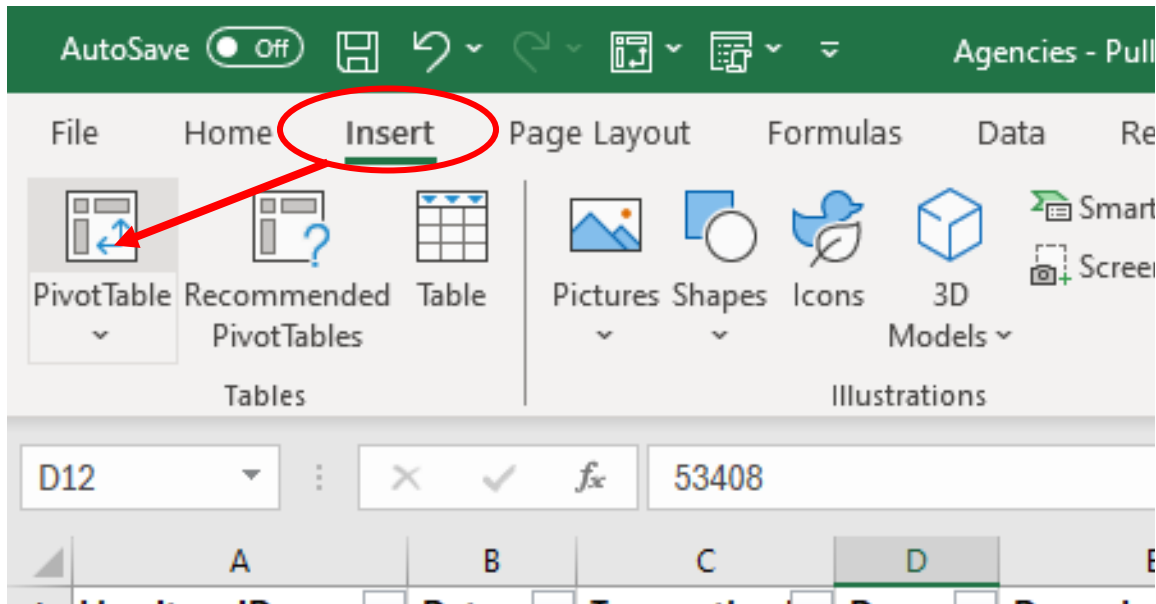
- Open file, locate the “Pounds” section → sum up total pounds below the last line  
*\*TIP: To easily locate grand total, bold or highlight the cell!*

L	M	N	O	
Description	Pounds	Food Bank Name	Agency Name	Donor Name
	38	Feeding San Diego	AGENCY ABC	Sprouts Farmer
	37	Feeding San Diego	AGENCY ABC	Sprouts Farmer
	66	Feeding San Diego	AGENCY ABC	Sprouts Farmer
	288	Feeding San Diego	AGENCY ABC	Costco Wholes:
	20	Feeding San Diego	AGENCY ABC	Costco Wholes:
	8	Feeding San Diego	AGENCY ABC	Costco Wholes:
	40	Feeding San Diego	AGENCY ABC	Costco Wholes:
	353	Feeding San Diego	AGENCY ABC	Costco Wholes:
	48	Feeding San Diego	AGENCY ABC	Costco Wholes:
	<b>14083</b>			

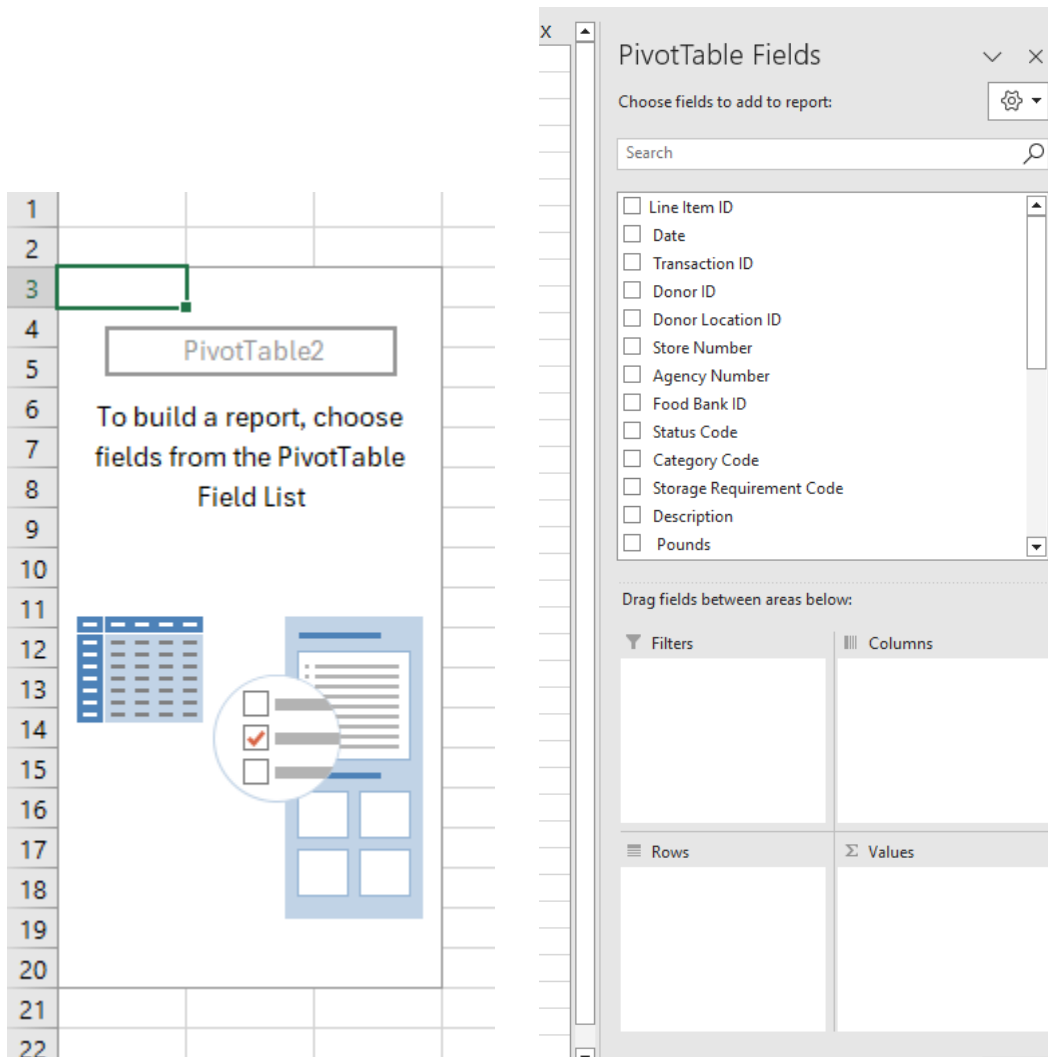
- Save file → Include your agency’s name and time frame in the file name.  
**Example:** Agency ABC Pounds Report 01.01.23 – 06.30.23

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”

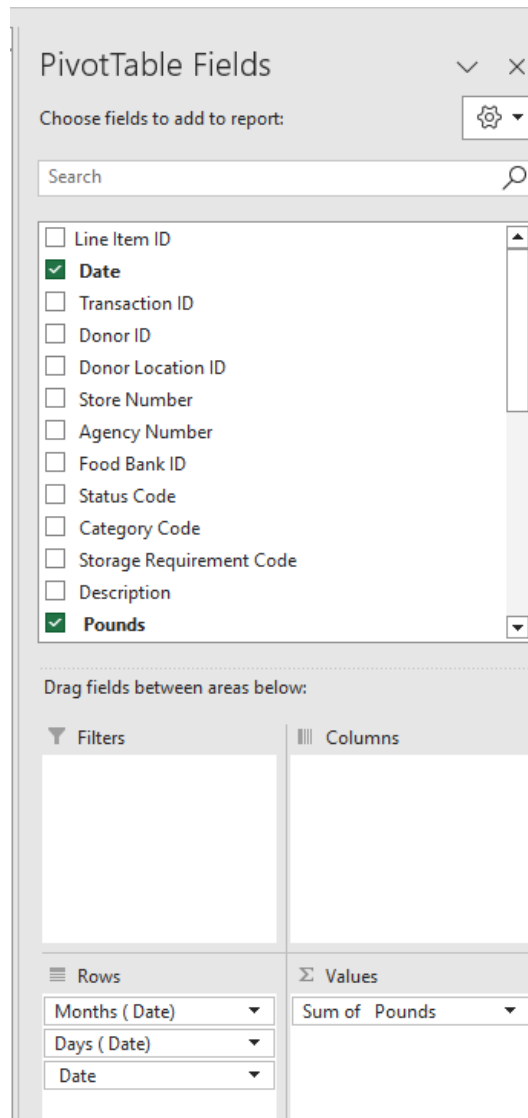


3. A different tab will open up (within the same report) and you should see a pivot table appear on the left side and the PivotTable Fields on the right (if not, click on the pivot table itself).



The image shows two parts of an Excel interface. On the left, a PivotTable is displayed in a worksheet. The PivotTable is titled 'PivotTable2' and contains the following text: 'To build a report, choose fields from the PivotTable Field List'. Below the text are two icons: a grid representing a data table and a PivotTable layout. A green box highlights the PivotTable area. On the right, the 'PivotTable Fields' task pane is open. It has a search bar and a list of fields with checkboxes: Line Item ID, Date, Transaction ID, Donor ID, Donor Location ID, Store Number, Agency Number, Food Bank ID, Status Code, Category Code, Storage Requirement Code, Description, and Pounds. Below the list are four sections for organizing fields: Filters, Columns, Rows, and Values. The 'Rows' section is currently empty, and the 'Values' section is currently empty.

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. **Σ 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:

1			
2			
3	<b>Row Labels</b>	<b>Sum of</b>	<b>Pounds</b>
4	⊕ Jul		596
5	⊕ Aug		12,170
6	⊕ Sep		1,317
7	<b>Grand Total</b>		<b>14,083</b>
8			
9			