Advanced Search for Contacts

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Donor Management System

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Overview

Contacts Advanced Search lets you search for one or many Contacts based on criteria found on Contact Profiles.

You can filter and segment your Contacts based on one or more data points or search for a group of Contacts with information that falls within a set range of parameters.

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

- Update multiple contacts at once
- Add/remove a Tag to multiple contacts at once
- Build a Group or Smart Group (first step to Bulk Emailing)
- Export the segmented contact list

When to Use Advanced Search for Contacts?

- 1. Compile a list of potential donors,
- 2. Prepare Contacts for a mailing,
- 3. Create Groups or Smart Groups,

- 4. Understand who has donated within a specific time period, or
- 5. Find Contacts that have specific attributes that cannot be found using the Simple Name Search.

Example: retrieve a list of Contacts who have donated over \$100 in the current year.

Additional examples that may call for an Advanced Search:

- A Contact that has a specific Note in their Contact Profile,
- A Contact where the City they reside in is known, as well as their First Name, but not their Last Name,
- All Contacts who contributed to a specific Campaign,
- All Contacts who have **made Contributions under**, over or between a certain range (e.g. between \$50.00 and \$500.00),
- All Contacts whose most recent Contribution is within the current month,
- All Contacts within a specific **City or Postal Code range**.

Performing an Advanced Search for Contacts

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

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

	nue Dashbo	oard Contacts	Contributions	Campaigns Opp	ortunities Reports DMS Mail		DMSCA DMSCA
arch by co	ntact name or email						Q Advanced Sea
Actions	O Selected Records	s Only 🔿 All 173 Red	cords			All contacts 👻	Advanced Actions 👻 Add Contact 👻
	Name	City	Province	Phone	Email	Date Created	Last Modified
	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	0 Oct 26th, 2022 2:17 PM

3. The first two sections (1) *Display Settings* and (2) *Contacts* will be opened. The (3) subsequent sections are all collapsed and must be selected to open the available search fields

Avenue Dashboard Contacts	Contributions Campaigns Opportunities Reports D	MS Mail	Settings H
 Edit Search Criteria 			
~ Display Settings			
SPLAY RESULTS AS	SEARCH OPER	RATOR	
Contacts -	● AND ○	OR	
Search in trash (deleted contacts)			
Contacts			
Contacts			
NAME	EMAIL	CONTACT TYPE(S)	
Complete or partial name	Complete or partial email		▼
GROUP(S)	CONTACT TAGS(S)		
		*	
Exclude Include by Privacy Option(s)		PREFERRED COMMUNICATIO	DN METHOD
Exclude Include by Privacy Option(s)		PREFERRED COMMUNICATIO	ON METHOD
Exclude O Include by Privacy Option(s)		Any Email On Hold	ON METHOD
· · ·	PHONE LOCATION	Any	ON METHOD
PHONE		Any Email On Hold	ON METHOD *
PHONE Punctuation and spaces are ignored.	Алу	Any Email On Hold PHONE TYPE	ON METHOD *
PHONE Punctuation and spaces are ignored.	Any	Any Email On Hold PHONE TYPE	VN METHOD V
PHONE Punctuation and spaces are ignored. CONTACT ID	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	VN METHOD V
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE	Any	Any Email On Hold PHONE TYPE	VN METHOD V
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE Job title	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	VN METHOD V
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE Job title PREFERRED LANGUAGE	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	VN METHOD V
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	VN METHOD v
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE Job title PREFERRED LANGUAGE	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	The second secon
PHONE Punctuation and spaces are ignored. CONTACT ID JOB TITLE Job title PREFERRED LANGUAGE Ary	Any CONTACT SOURCE Contact source	Any Email On Hold PHONE TYPE	The second secon

4. To open or close a section of Advanced Search, click on its name

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

~ Notes
~ Change Log
~ Contributions
~ Mailings
~ Opportunities
Scarch Reset Form
When ready, select Search

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

7. To begin a new search, select *Reset Form* and all former search criteria will be reset.

~ Notes	
∽ Change L	og
~ Contribut	tions
∽ Mailings	
∽ Opportur	nities
✓ Search	Reset Form
	Select Reset Form to begin a new search

Advanced Search for Contacts Sections

Advanced Search is categorized by multiple sections containing specific information about your Contacts. The following will provide context on how many of the fields and features of Contacts Advanced Search can be applied to your search.

Display Settings

• **Results:** the Contact Advanced Search function defaults to showing Contacts as a search result. However, the tool can be configured to display results of different items including Contributions and Activities.

For example:

~ Edit Search Criteria			
~ Display Settings			
RESULTS	VIEW	SEARCH OPERATOR	
Activities -	Search Result Listing -	AND OR	
Search in trash (deleted contacts)			
			Reset Form Search
~ Contacts			
	Example: Results > Activities		

When searching for Contacts, ensure the Results field is set to Contacts.

- View: Different data about your Contacts. To change the view, simply select one of the alternate views from the drop-down menu.
- Search Operator And, Or: The search operators AND and OR define how the search criteria should be applied.
 - For example:
 - Contacts who reside in your organisation's City AND have Contributions that were received in 2020 would return a list of your local & active donors.
 - Contacts who reside in your organisation's City OR have Contributions that were received in 2020 would return a list of your local donors, regardless of Contribution dates as well as all your

active donors, regardless of location.

• Search in trash (deleted contacts): Searches for deleted Contacts. This may be used if you are seeking to recover any accidentally deleted Contacts.

Contacts

NAME	EMAIL		CONTACT TYPE(S)	
Complete or partial name	Complete or partial email			~
GROUP(S)	CONTACT TAGS(S)			
~		~		
Exclude O Include by Privacy Option(s)			PREFERRED COMMUNICATION ME	THOD
			Any	~
			Email On Hold	
PHONE	PHONE LOCATION		PHONE TYPE	
	Апу	~	Any	~
Punctuation and spaces are ignored.				
CONTACT ID	CONTACT SOURCE			
٢	Contact source			
JOB TITLE	EXTERNAL ID			
Job title				
PREFERRED LANGUAGE				
Any -				

- Name & Email: Enter full or partial information in the Name or Email fields to retrieve Contacts.
- *Contact Type(s):* Individual, Household or Organization contacts can be searched on this field, as well as any additional Sub-Contact Types you may have configured. You can select one or multiple Contact Types at once.
- *Group(s)*: search for Contacts that are members of the selected Groups or Smart Groups. You can select one or multiple Groups at once.
- Contact Tag: select one or more Tags to include in your search. Learn more about Tags here.
- *Privacy Settings*: you may decide to include or exclude Contacts based on their Privacy Settings. For example, if preparing a list of Contacts for a mail campaign, you will want to select *Exclude* Contacts who have been marked *Do not mail*. You can select one or more options at once. You may also prefer to *Include* Contacts that have explicitly opted into receiving email communications when giving a one-time donation through a custom donation form ("*Email opt in*").
- **Preferred Communication Method:** if Contacts have been recorded with preferred communication methods (email, phone, mail), these can be searched here so that their communication preference can be honoured.
- **Contact ID & External ID:** all Contacts within the DMS are assigned a unique Contact ID. If you imported historic Contacts from a former database, you may use the External ID field to search for Contacts based on their corresponding unique External IDs from your former system.
- Contact Source: Search if Contacts originated through a "CanadaHelps" donation or manually entered ("DMS

Address Fields

• You may enter partial information in the Street Address and Postal Code fields to retrieve data about your

Contacts' locations.

∧ Address Fields					×
STREET ADDRESS	сіту з		ADDRESS LOCATION		
Street address	City	~	Primary	~	
SUPPLEMENTAL ADDRESS 1	COUNTRY 1		POSTAL CODE		
Supplemental address 1	🛛 Canada	-	Postal Code		
SUPPLEMENTAL ADDRESS 2	PROVINCE 2				
Supplemental address 2	- none -	~			
	Example: A	ddress Fields			

1. If searching for Contacts within one or more Provinces, you must first set the Country before the list of

Provinces can be selected.

- 2. Select the desired Province(s)
- If you want to specify a region, you can select the *City* drop-down and select one or multiple locations from the list of Canadian towns and cities

Custom Fields

- Summary Fields: useful if you are seeking a list of Contacts based on their giving history within a set range.
 - For example:
 - When searching for Contacts whose total giving history is between \$500 and \$1000, enter the beginning of the range in the first field, and the top of the range in the second field.

 Summary Fields 		
TOTAL CONTRIBUTIONS IN THE LAST 12 MONTHS FROM		то
AMOUNT OF LAST CONTRIBUTION FROM		то
DATE OF LAST CONTRIBUTION	Any -	
DATE OF FIRST CONTRIBUTION	Any -	
LARGEST CONTRIBUTION FROM		то
TOTAL LIFETIME CONTRIBUTIONS FROM	500	то 1000
COUNT OF CONTRIBUTIONS FROM		ТО
Exar	mple: Custom Fields section > S	iummary Fields

- You can also use the first field to simply enter \$500 and that will return all Contacts whose total lifetime Contributions are \$500 and over.
- Use the Date of First Contribution field to find new donors within a specific date range
- Use the **Date of Last Contribution** field to find lapsed donors within a specific date range

Activities

- Contacts with Activities can be retrieved by Type, Priority, or text included in the Details of the Activity.
- You can also search for Activities based on Contact > 'With', 'Assigned to' or 'Assigned by'. Then enter the name of the Contact or DMS User in the *Name* search field under the *Contacts* section.
- If you wish to view Activities themselves, go to *Display Settings*, change the *Results* from *Contacts* to *Activities* and refresh your search.

Relationships

~ Relationships			×
Child of Employer of Partner of Child Chil	•	TARGET CONTACT	2
RELATIONSHIP STATUS Active Inactive All RELATIONSHIP START DATE		1 RELATIONSHIP END DATE	
Any	•	Any .	
		Example: Relationships	

- 1. Contacts with Relationships can be retrieved by Relationship Type (multi-select), Date or Status.
- 2. If searching for all Contacts with a Relationship to a particular Contact, enter the name of that Contact in the *Target Contact* field.

Demographics

• From the dropdown, select "Yes" in the 'Contact is deceased' box if seeking a list of Contacts that have been marked deceased. Select "No" to exclude those Contacts from the list

Notes

• If you're seeking Contacts that have specific notes in their Profile, enter partial text that would be found in the Note (either by the Subject or Body of the Note).

Change Log

• Retrieves Contacts based on which User of the DMS has modified them or their Last Modified Date.

Contributions

The Contribution fields will retrieve Contacts based on their Contribution history. Below are some commonly selected fields.

< Contributions		
DATE RECEIVED	CONTRIBUTION STATUS	CURRENCY
Any -	v	Any ~
CONTRIBUTION AMOUNTS	PAYMENT METHOD	FUND
From To	Any *	All Contributions *
RANSACTION ID	INVOICE NUMBER	GL ACCOUNT
Transaction ID	Invoice Number	Any 🗵
AMPAIGN GROUPS	CAMPAIGN	SOURCE
	Any *	Contribution Source *
HANK YOU SENT	CONTRIBUTION RECEIPTED	PREFERRED COMMUNICATION METHOD
Any ~	Any -	
 Additional info 		
CH FUND Any	*	
,		
 Contribution Details 		
EXCLUDE FROM TAX RECEIPTING		
Ø Any	*	
FEES COVERED Any	▼	
RECEIPT NUMBER		
CONTRIBUTION NOTE		
	Contribution details	
	Contribution details	

- Date Received: search for Contacts who have made Contributions within a certain date range
- Contribution Status: Contributions that have been refunded, cancelled, scheduled, etc. can be searched here
- Contribution Amounts: set a minimum and/or maximum dollar range
- Payment Method: Credit Card, Cash, Cheque, In Kind donations can be segmented with this field
- Fund: to find Contacts who have made at least one Contribution to a specific Fund
- *Transaction ID:* all CanadaHelps contributions have Transaction IDs. Use this field to find a specific CanadaHelps contribution.
- GL Account: to find Contacts who have made at least one Contribution associated with a specific GL account
- Campaign Groups: search for Contact who have made at least one Contribution associated with a specific Campaign Group
- Campaign: search for Contact who have made at least one Contribution associated with a specific Campaign
- Source: if the Contribution has come from CanadaHelps or manually entered
- Thank you or Receipt Sent: if a thank you message or tax receipt has been issued through the DMS, it can be searched here

Additional Info

• CH Fund: to find Contacts who have made at least one Contribution to a specific CH Fund via CanadaHelps.org

Contribution Details

Note: these details might be better searched within the Contributions tab.

- **Exclude from Tax Receipting:** if at any point within the parameters of the search, a Contact's contribution(s) has been excluded from receipting
- *Fees covered:* if at any point within the parameters of the search, the fees of a CanadaHelps contribution has been covered by the Contact
- Contribution Receipted: if at any point within the parameters of the search, a Contact's contribution(s) has

been marked as receipted externally from the DMS

- Receipt number: search for the contact of a specific receipt number
- Contribution note: search for partial details within the note field\

Dedication fields

 Dedication Information 		
IN MEMORY OF	Any	
IN HONOUR OF	Any	
NAME OF HONOREE		
MESSAGE		
∧ Custom Question		
CUSTOM QUESTION(S)	- select -	
IS THERE AN ANSWER TO THE SELECTED QUESTION?	Any -	
 Recurring Contributions 		
IS CONTRIBUTION RECURRING ?		

- In memory of: if you wish to retrieve Contacts who have made Contributions in memory of someone, select Yes
- In honour of: if you wish to retrieve Contacts who have made Contributions in honour of someone, select Yes
- Name of Honouree: field used for both in memory of and in honour of. Search for a specific individual name here
- Message: if a donor has provided an additional message with their Contribution, this can be searched here

Custom Question

- Custom Question(s):
- Is there an answer to the selected question?:

Recurring Contributions

• Is the contribution recurring?: If at any point within the parameters of your search, a Contact's contribution has been marked as *Recurring*, this can be searched here

-> If you are seeking for specific Contribution records, learn more about Contribution Advanced Search.

Opportunities

• Any Contact associated with Opportunities can be retrieved using the **Opportunities** fields.