

Search Builder

Last Modified on 04/15/2026 4:49 pm EDT

Donor Management System

In your DMS [Reports tab](#), you can access over 40 report templates to unlock deeper insights about your donor data, including the most commonly requested reports for Contacts, Contributions, Tax Receipts, Activities and more, to which you can then apply a series of filters for even further segmentation.

That said, if you're finding that the preset report templates just don't quite capture the information you need, you can instead take advantage of the DMS' **Search Builder tool** to create even **more customized reports**, with more complex filtering options.

This article will outline the main functionality of Search Builder and how you can use it to build a report from scratch.

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What is Search Builder?

Search Builder is a powerful tool that allows you to build highly complex searches using almost all of the data points available in your DMS. Unlike the regular Reports tab, with Search Builder, you can apply

elaborate conditioning to more closely filter your search results. You also have more flexibility in deciding how your search results display.

Considerations

- Due to its **complex functionality and distinct interface**, if using Search Builder to build a report entirely from scratch, we recommend assigning this task to your more technical staff members, and/or those with experience creating search queries using a CRM.
- At the moment, Search Builder reports do not save in your [main DMS Reports tab](#). To save a Search Builder Report, simply **bookmark its exact URL**.
- Currently, Search Builder search results **display only in tabular format** and can't be visualized in another format (e.g., as a bar graph, pie chart, or line graph).

Accessing the Search Builder Tool

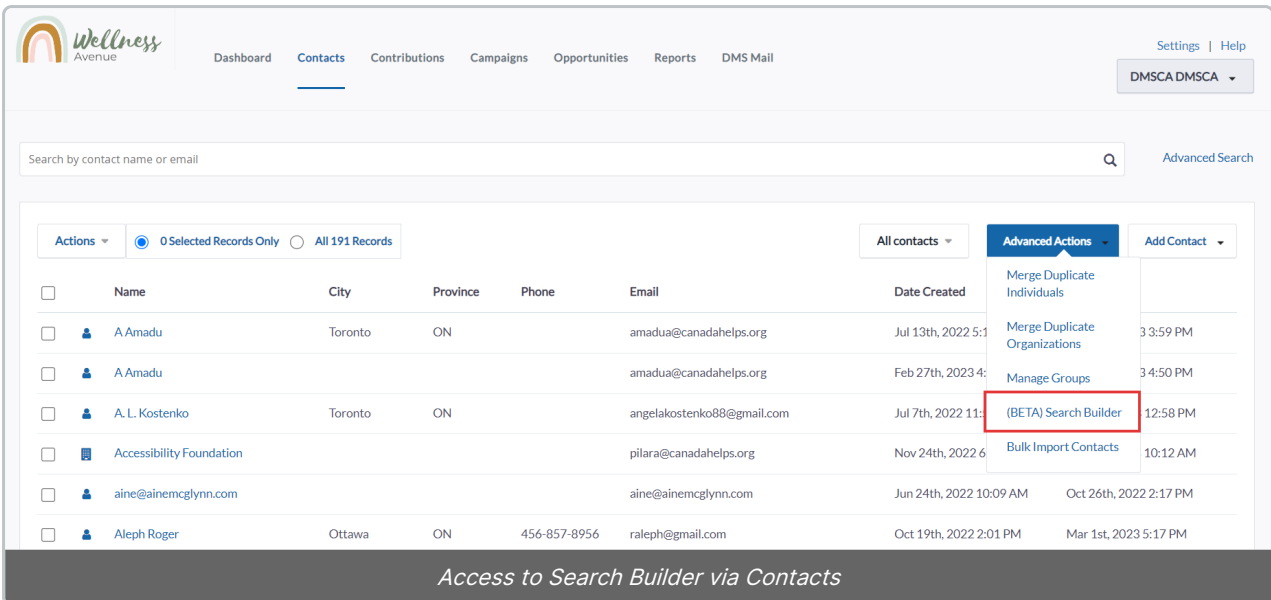
At the moment, you can access Search Builder directly through both your **Contacts and Contribution tabs**. You'll want to access the tool through one tab or the other depending on what **the main entity you wish to centre your search around** is.

So, for example, if your search focuses mainly on Contacts (e.g, you want to see all Contacts with Contributions/Activities/Tags), you can access the tool through the Contacts tab. On the other hand, if your search centres primarily around Contributions (i.e., you only need to see Contribution data), you can access it through your Contributions tab.

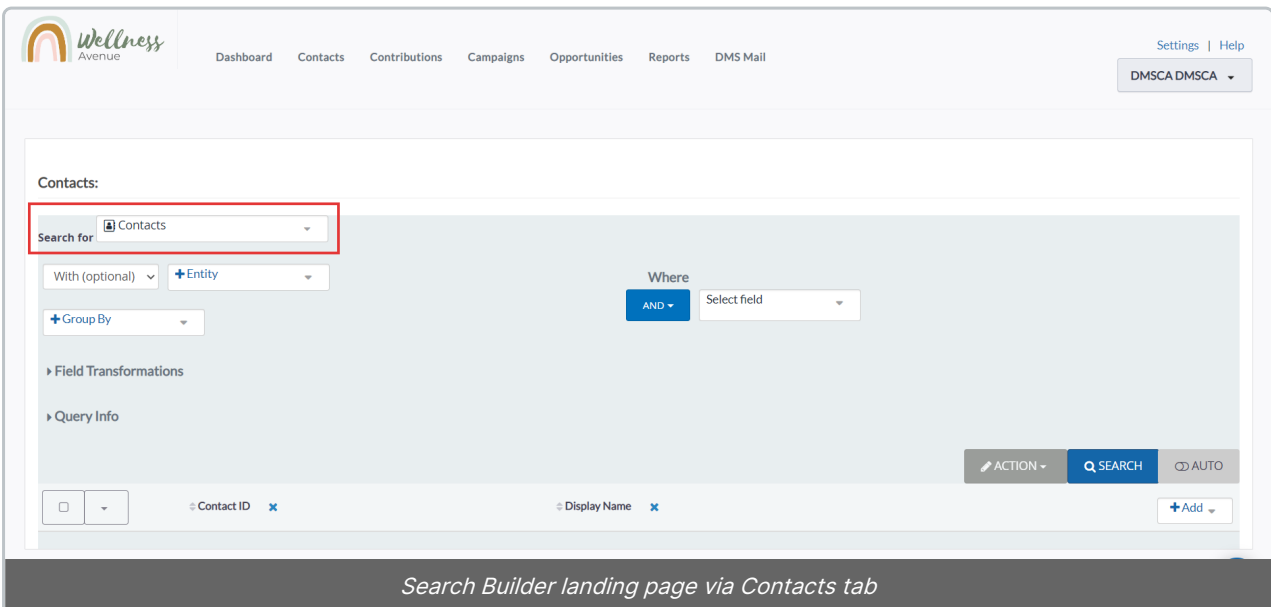
Note: Regardless of where you access Search Builder from, you can always **change the main entity** after accessing the tool.

Through the Contacts Tab

1. Visit your **Contacts tab**.
2. Under **Advanced Actions**, select **(Beta) Search Builder**.



3. You'll then be brought to the **Search Builder landing page** where you can begin to create your search.



Through the Contributions Tab

1. Visit your **Contributions tab**.
2. Under **Advanced Actions**, select **(Beta) Search Builder**.

Wellness Avenue

Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Search by contributor name or email

Advanced Search

Actions 0 Selected Records Only All 1500 Records

All Contributions

Advanced Actions

Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Batch Data Entry	Print No.	Thanked
<input type="checkbox"/>	March 10th, 2023 02:59 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	(BETA) Search Builder		-
<input type="checkbox"/>	March 9th, 2023 04:54 PM	Lam Nicole	\$150.00	General Fund		DMS Manual	Bulk Import Contributions	Completed	-
<input type="checkbox"/>	March 9th, 2023	Lucas Froese	\$100.00	General Fund		DMS Manual		Completed	-

Access to Search Builder via Contributions

3. You'll then be brought to the **Search Builder landing page** where you can begin to create your search.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Contributions:

Search for Contributions

With (optional) +Entity

Where AND Select field

+Group By

Field Transformations

Query Info

ACTION SEARCH AUTO

Contribution ID

+Add

Search Builder landing page via Contributions tab

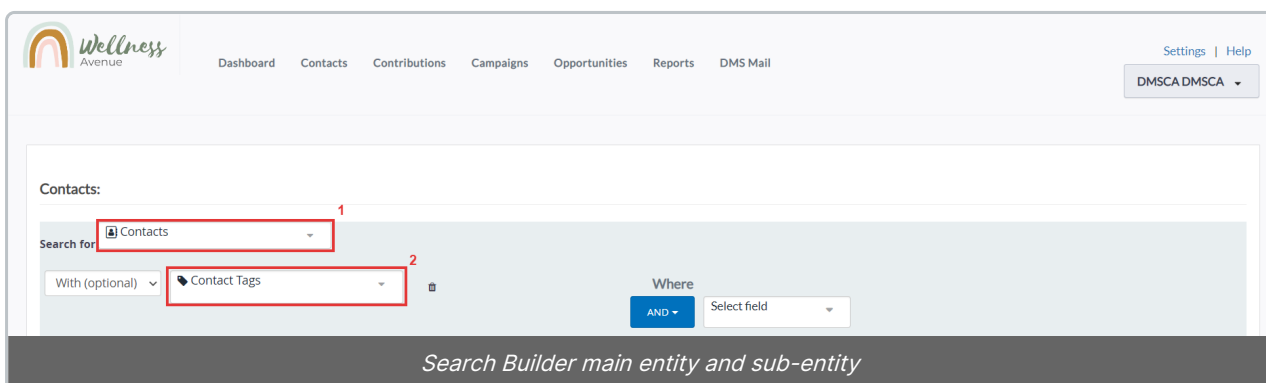
Navigating the Search Builder Components

Before you begin building your Search Builder report, it's useful to understand some of the key terms you'll see on the Search Builder page, and how they relate to your DMS.

Entity

An **entity** is any "thing" you want to search within the DMS. In most cases, you'll be searching for **one of two main entities: Contacts or Contributions**. Your main entity will depend on whether you've accessed the tool from the Contacts tab or from the Contributions tab. But as a reminder, you can always change the main entity after accessing the tool.

You can then add multiple **sub-entities** to your search. For example, if you'd like to see all (1) *Contacts* (main entity) with (2) *Tags* (sub-entity).

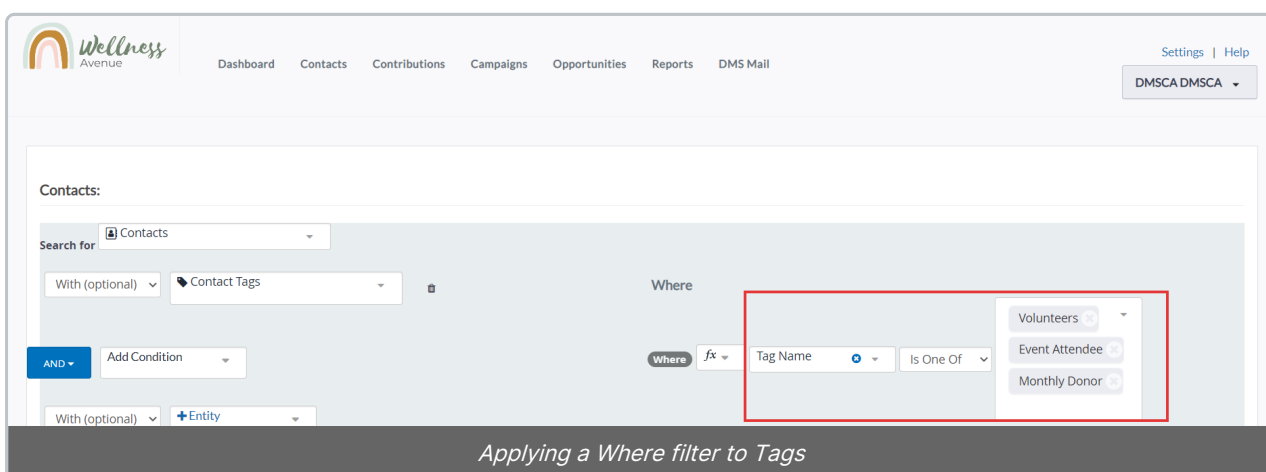


Important: The **main and sub-entities** that you choose here will **dictate which fields you'll be able to filter by and view** in the rest of your search. So, if you need to see a certain filter or column in your report, it's a good rule to add it as a main or sub-entity first.

E.g., If you're searching for *Contacts* (main entity) with *Tags* (sub-entity) and *Emails* (sub-entity), you'll then be able to choose from a series of filters/columns relating specifically to *Contacts*, *Tags*, and *Emails* (see [Columns](#) section below for more details).

Where

The **Where** section is where you define the **criteria/conditions/filters** that relate to your chosen entity/ies, and which will help to narrow your search. As a reminder, the main and sub-entities you chose previously will dictate which *Where* fields you can filter by (see section above: *Entity*).



Important: *Where* filters **apply only to individual results**, and not to results as an aggregate.

For example, when applying a condition to the *Where* field **Total amount**, your results will only show those Contributions where the **total amount of any one individual transaction meets** the set

criteria, as opposed to the total amount of all transactions a Contact may have made.

In other words, in the example below, our search results will only list a Contact's individual Contributions which are greater than or equal to "1000". So, even if a Contact had also made numerous donations under \$1000, they won't appear in our result list for that Contact:

The screenshot shows the 'Wellness Analytics' Search Builder interface. The search criteria are configured as follows:

- Entity: Contacts
- Condition: With (optional) Contact Contributions
- Where: Greater Than or Equal To Total Amount (1000)
- Having: (empty)

The resulting table shows the following data:

Contact ID	Display Name	Total Amount
481	A.L. Kostenko	\$ 1,000.00
321	Ada Anderson	\$ 6,000.00, \$ 1,894.00
399	Alex Fergie	\$ 5,000.00, \$ 1,000.00, \$ 1,500.00, \$ 1,000.00
307	Amelie A Poulin	\$ 1,000.00

This can be problematic if what you're actually looking to see is a list of all donations made by a Contact where the **sum of these donations** is greater than or equal to a certain amount. To do this, you'll need to use the **Having** section instead (see below).

Columns

With Search Builder, you're able to decide what columns you want to see in your report, and move them around as needed once selected.

Reminder: In order to be available for selection in the **Add+** menu, your desired columns must **first be added as an entity or sub-entity** (see section above: *Entity*).

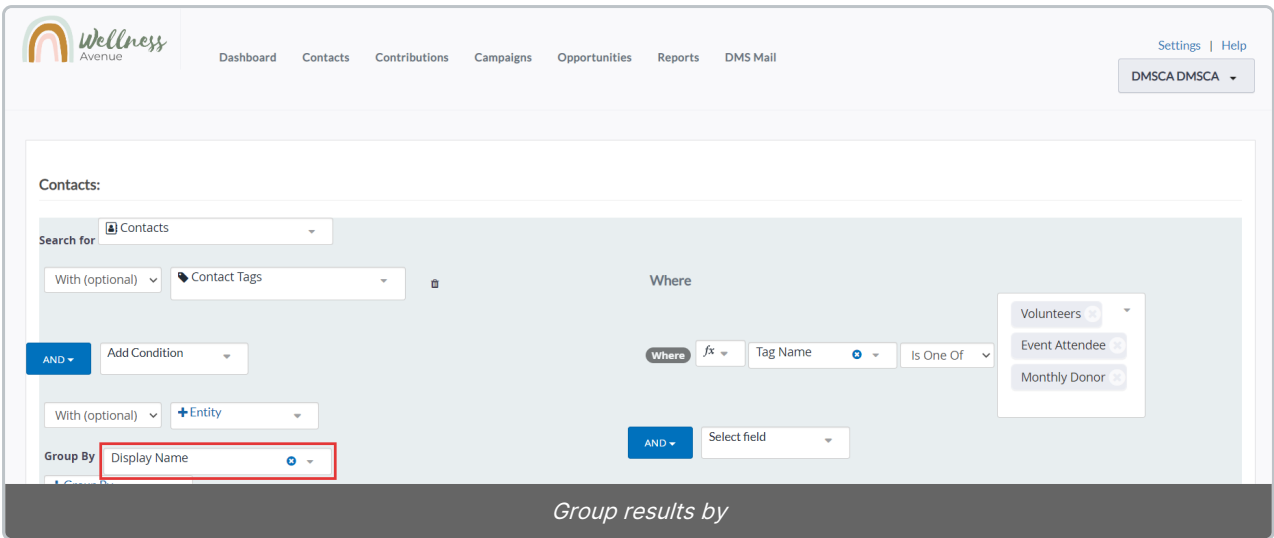
E.g., If you're searching for *Contacts* (main entity) with *Tags* (sub-entity) and *Emails* (sub-entity), you'll then be able to choose from a series of columns relating specifically to *Contacts*, *Tags*, and *Emails* from the **Add+ menu**.

Group By

Group by allows you to sort your search results by a specific characteristic and will help you **ensure uniqueness** in your search results (e.g., to make sure your results display only once per Contact).

You can group your results by whichever field is most relevant to your search such as by *Contact Name*, by *Fund Designation*, by *Campaign*, by *Payment Method*, by *Is Recurring* and more.

Tip: If you need to be able to **click through to Contact profiles** from your search results, we recommend **grouping by Display name**.

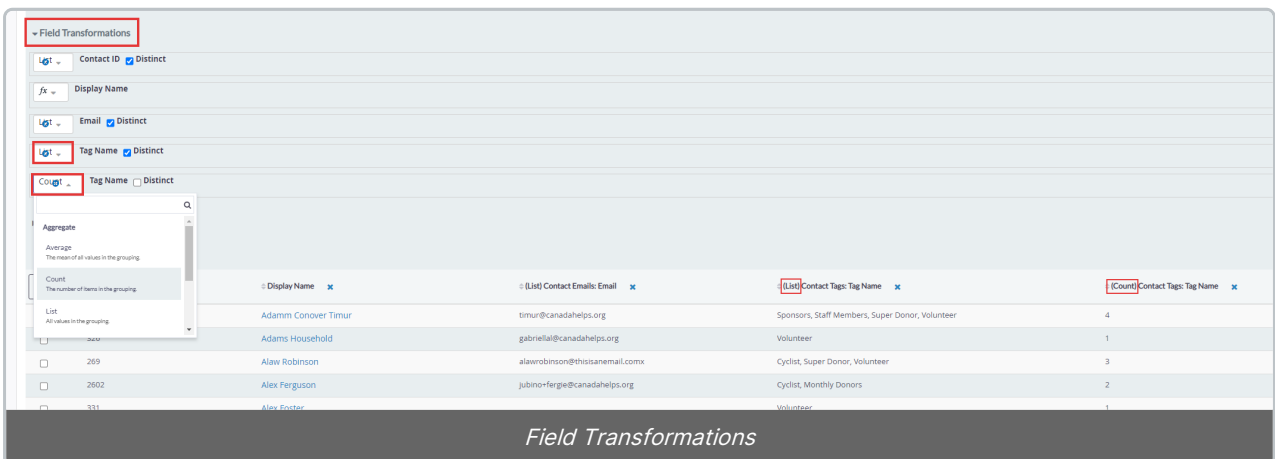


Note: At the moment, it's not possible to group search results by *Date*.

Field Transformations

By default, search results will always show as a list. But, **Field Transformations** allow you to transform a specific column's results so that you can view them in a different format. And, each column can have a different *Field Transformation* applied to it.

For example, in one column you may want to see an itemized **list of your results** (e.g., a *list of all Tags* associated with a Contact); alternatively, in another column, you may prefer to see a **count of your results** (e.g., *how many Tags* are associated with a Contact).



Having

After selecting what you'd like to *Group By*, the **Having** section will appear below your **Where** section. **Having** allows you to define the **criteria/conditions/filters** on the specific columns that you've selected,

after applying groupings and transformations to these columns.

As a reminder, while *Where* filters apply only to individual results, **Having filters will apply to aggregate results.**

In other words, continuing with our previous example, you can use the Having section to see a list of all Contributions made by a Contact where the **sum of their Contributions** is greater than or equal to a certain amount (here "1000"). That way, you're seeing the **total amount ever donated** by any Contact who has given \$1000 or more, and not just a list of their past Contributions over that amount:

The screenshot shows the 'Wellness Avenue' Search Builder interface. The 'Where' section is empty. The 'Having' section contains a filter: '(Sum) Contact Contributions: Total Amount' is greater than or equal to 1000. A red arrow points from the 'Having' filter to the table below. The table has columns for Contact ID, Display Name, and (Sum) Contact Contributions: Total Amount. The data rows are:

Contact ID	Display Name	(Sum) Contact Contributions: Total Amount
481	A. L. Kostenko	\$ 4,484.92
321	Ade Anderson	\$ 10,012.00
399	Alex Fergie	\$ 26,367.00
307	Amelie A Paulin	\$ 5,825.61
576	Andy Double Doubles	\$ 3,486.00

Applying a Having filter on sum totals

Creating a Search Builder Report

Now that you understand the main parts of a Search Builder report, you're ready to build your desired search from scratch.

Example:

For the purposes of sending out a highly targeted email to donors who attended a past event, you want to build a report of all donors who have given **a total of \$X or more** (e.g., \$100) within a **certain time frame** (e.g., in the year 2022), and who have a specific **Tag assigned** to them (e.g., Casino Night).

Step 1: Decide your Main Entity

1. Because your main concern is to establish a list of *Contacts* that meet certain criteria, **the main entity will be Contacts**. So, visit your **Contacts tab**.

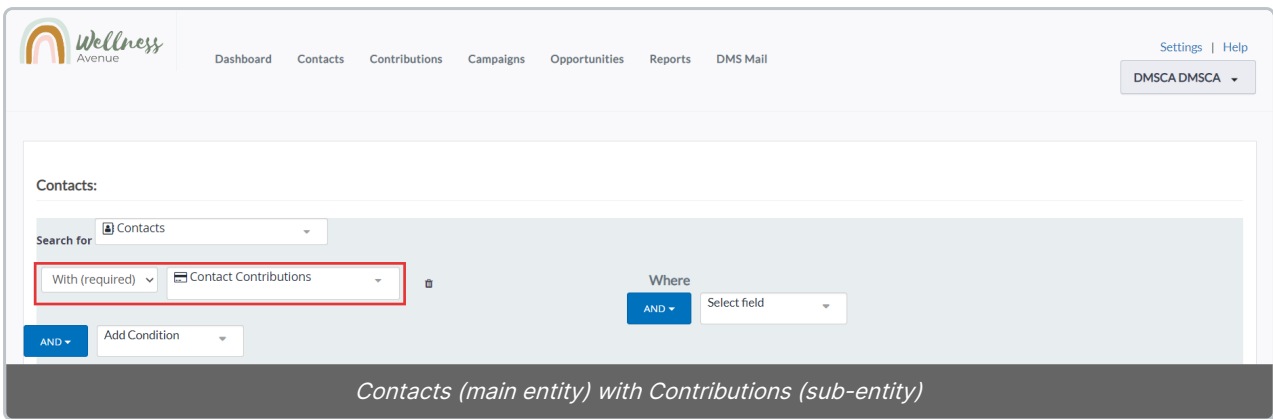
2. Under **Advanced Actions**, select **(Beta) Search Builder**.

The screenshot shows the Wellness Avenue web application interface. The top navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar at the top left is labeled 'Search by contact name or email'. Below the navigation, there are radio buttons for '0 Selected Records Only' and 'All 191 Records'. A table of contacts is displayed with columns for Name, City, Province, Phone, Email, and Date Created. The 'Advanced Actions' dropdown menu is open, and the option '(Beta) Search Builder' is highlighted with a red box. Other options in the menu include 'Merge Duplicate Individuals', 'Merge Duplicate Organizations', 'Manage Groups', and 'Bulk Import Contacts'. A dark grey banner at the bottom of the screenshot contains the text 'Access to Search Builder via Contacts'.

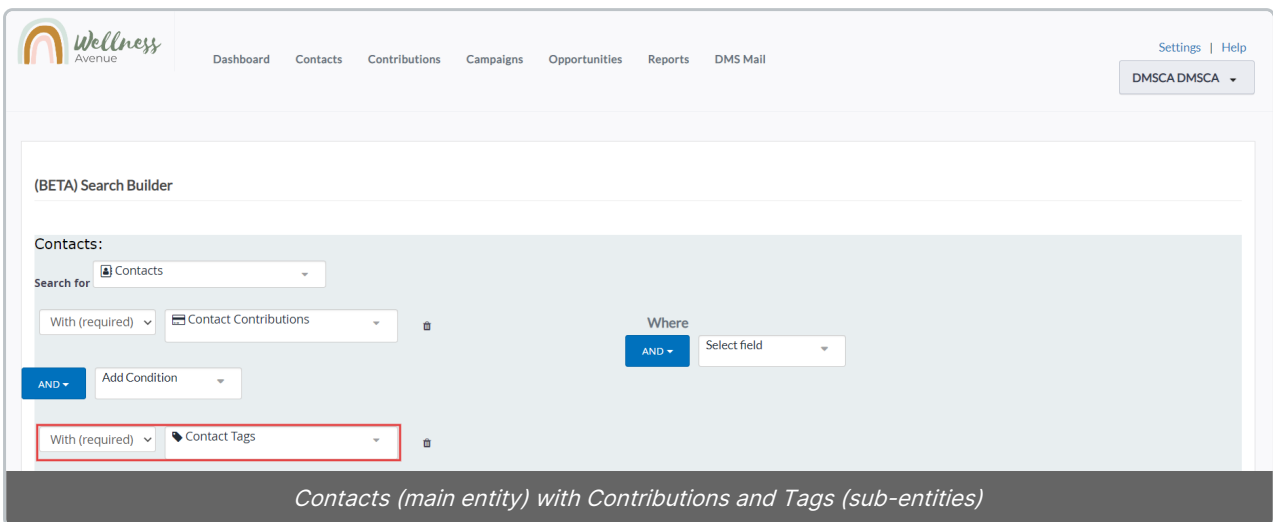
3. On the **Search Builder landing page**, you can begin to create your search.

The screenshot shows the Search Builder landing page in the Wellness Avenue application. The 'Search for' dropdown menu is open and 'Contacts' is selected, highlighted with a red box. Below this, there are options for 'With (optional)' and '+ Entity'. A 'Where' section contains an 'AND' button and a 'Select field' dropdown. At the bottom right, there are buttons for 'ACTION', 'SEARCH', and 'AUTO'. A dark grey banner at the bottom of the screenshot contains the text 'Main entity: Contacts'.

4. Because your secondary concern is to find all Contacts that have made donations, select **Contact Contributions** as your first **sub-entity**.

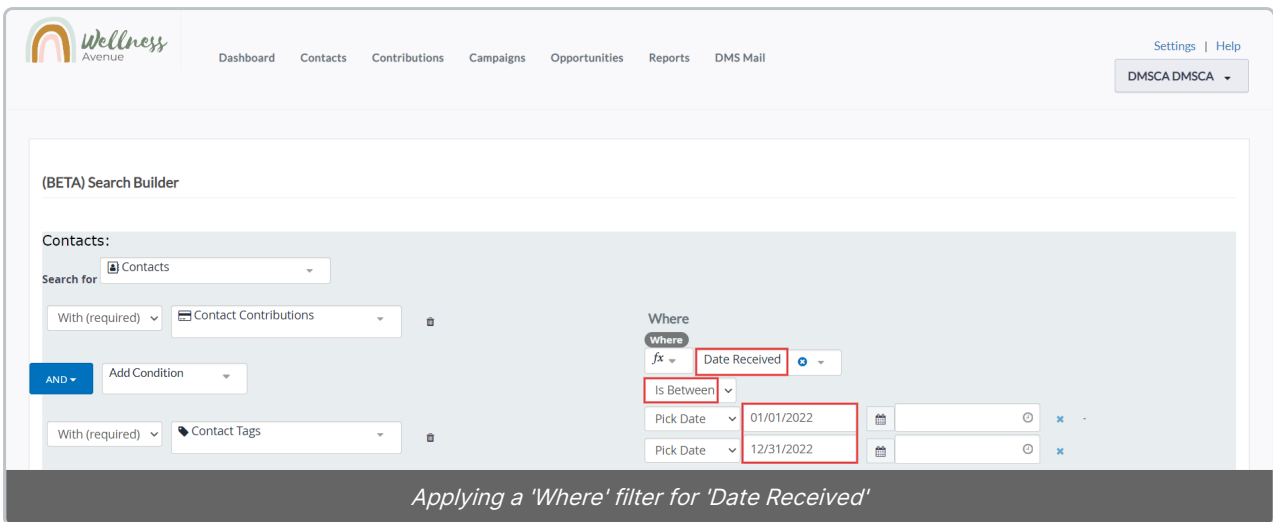


5. Lastly, because you're also concerned with finding all Contacts that have a specific Tag applied, select **Contact Tags** as your second **sub-entity**.

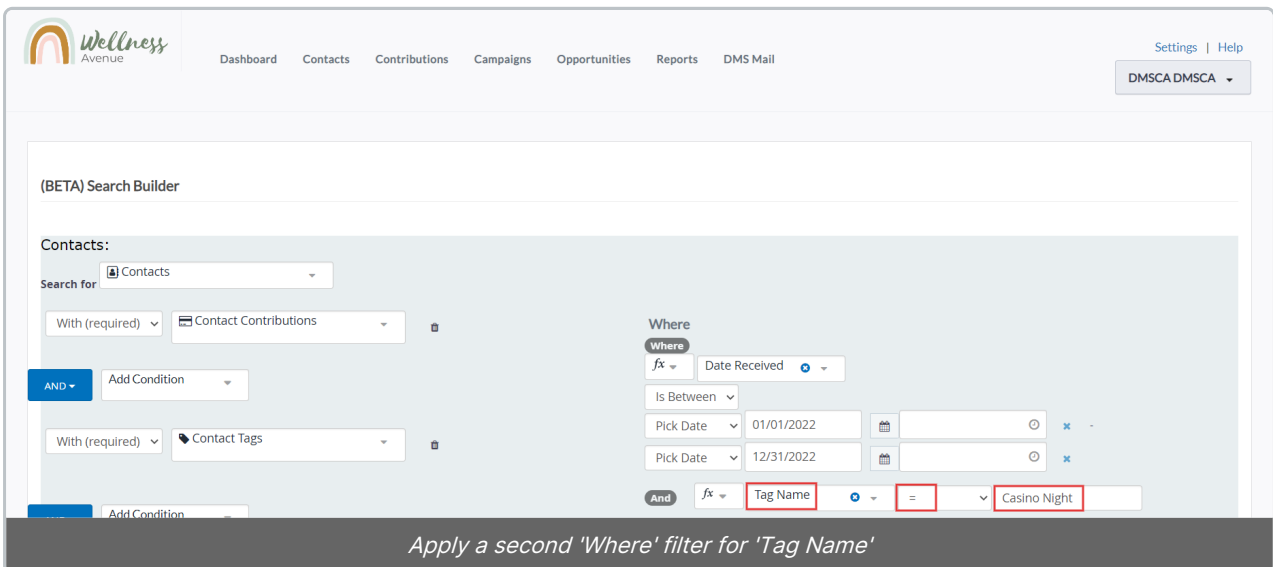


Step 2: Assign your 'Where' Conditions

6. Next, under **Where**, you can start to apply the desired filters to your main entity and sub-entities. For the first condition (i.e., donations made within the year 2022), select **Date Received** as the **Where** field, and apply the filter "Is Between" and the values "01/01/2022" and "12/31/2022".



7. For the second condition (i.e., donors tagged as "Casino Night"), select **Tag Name** as the *Where* field, and apply the filter is equal to ("=") and insert "Casino Night"



Tip: Don't worry, we'll apply our third and final search filter (i.e., *who have donated over \$100*) in the last step of creating our search (see below; Step 6: Apply any Having Filters)

Step 3: Choose your Report Columns

8. Select the **Add+** button to choose the columns you'd like to see in your report. You can then reorder or remove columns as needed.

Reminder: In order to be available for selection in the **Add+** menu, your desired columns must be

added as a sub-entity first.

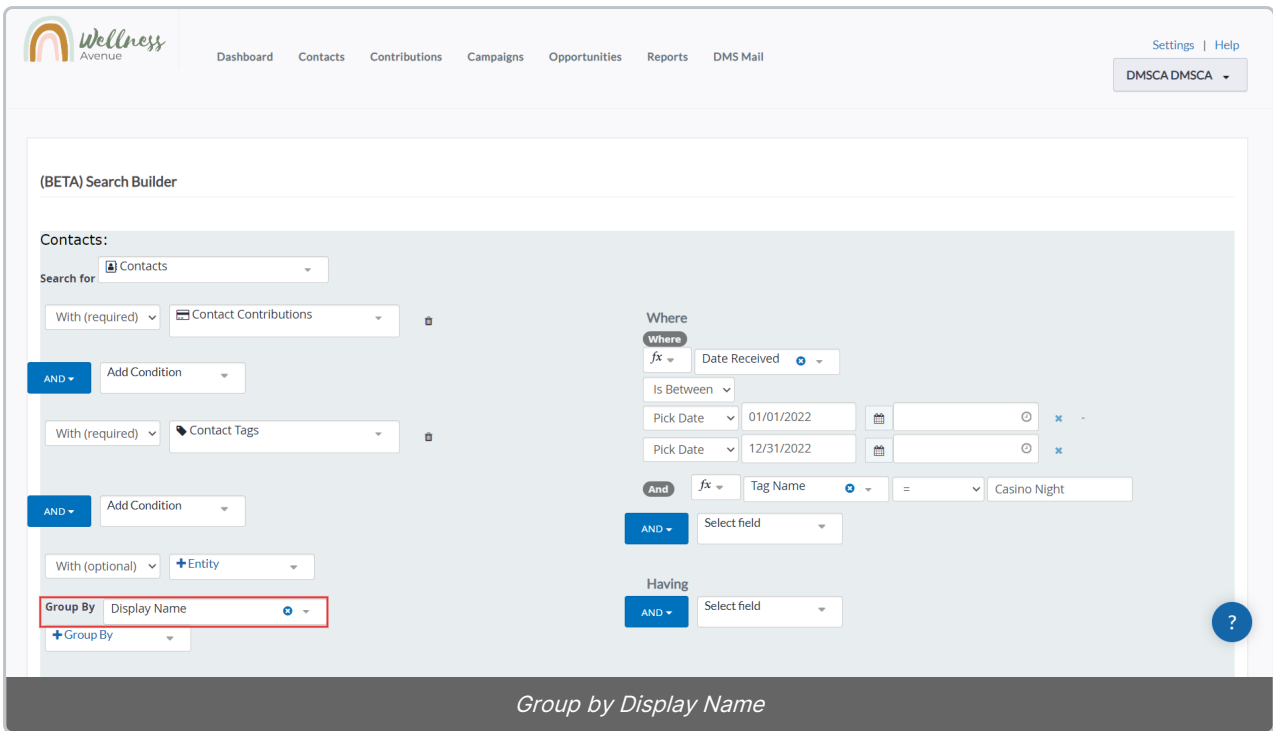
In other words, because you're searching for *Contacts* (main entity) with *Contributions* and *Tags*(sub-entities), the **Add+ menu** will provide a series of columns relating specifically to *Contacts, Contributions, and Tags*.

But, if you also wanted to see a column displaying other information (a column showing *Email Address, Activities, Mailing Addresses, Notes* etc.), you would need to add this desired column as another **sub-entity** (see **Columns** section above). It would then be available for selection in the **Add+ menu**.

The screenshot displays the 'Wellness Avenue' search builder interface. The main area is titled '(BETA) Search Builder' and shows a search configuration for 'Contacts'. The search criteria include 'Contact Contributions' and 'Contact Tags'. The 'Where' section allows filtering by 'Date Received' (Is Between 01/01/2022 and 12/31/2022) and 'Tag Name' (Casino Night). The bottom of the interface features a column selection bar with a red box highlighting the '+Add' button. The text 'Choose your columns' is displayed below the column selection bar.

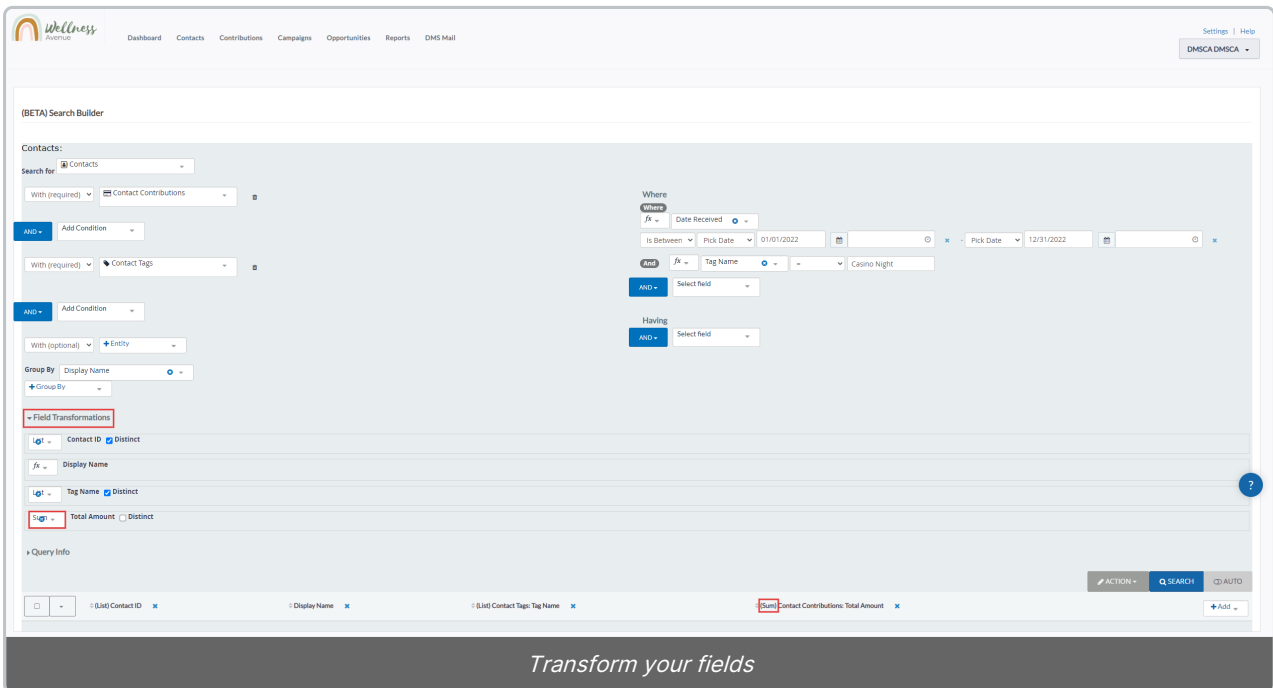
Step 4: Decide What to Group By

8. Next, decide what to group your search results by. Because we're most interested in Contacts as search results, we'll **group by *Display name***.



Step 5: Transform Specific Fields

10. Once you've chosen your report columns, open the **Field Transformations** tab. Here, transform the way a specific column will display its results by selecting one of the drop down options beside its name (e.g., Average, List, Sum, Count).

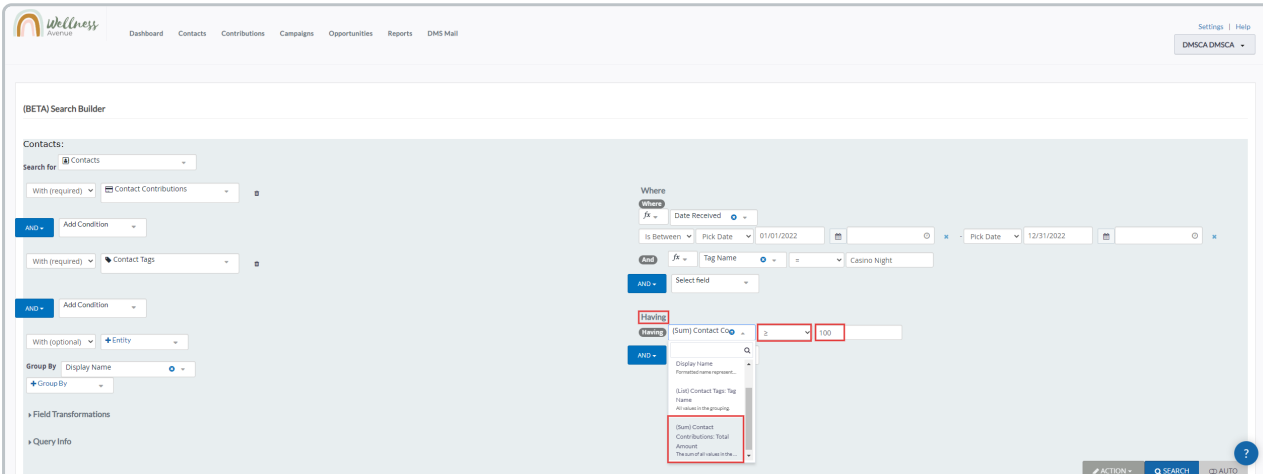


Step 6: Apply any 'Having' Filters

8. Finally, now that we've grouped by and transformed our fields, we can see the **Having section**. Here, we'll apply our third and last condition (i.e., donors who've given \$100 or more in total).

Reminder: for this last filter, because we're interested in seeing a *combined* donation amount and not the total amount of any *individual* transaction, we'll need to use the *Having* filter (instead of a simple *Where* filter).

Here, select the field **(Sum) Contact Contributions: Total Amount**, and then apply the filters greater than or equal to (" \geq ") and the value "100". This'll ensure that your search results show donors who have given a *total amount* of \$100 or more, as opposed to those donors who had simply given any *individual* donation/s over \$100.



The screenshot shows the Wellness Avenue Search Builder interface. The search criteria are as follows:

- Contacts:** Search for Contacts
- Where:** Date Received is Between 01/01/2022 and 12/31/2022
- And:** Tag Name is Casino Night
- Having:** (Sum) Contact Contributions: Total Amount is greater than or equal to 100

The interface also shows options for adding conditions, grouping by, field transformations, and query info. A red box highlights the 'Having' filter section, and another red box highlights the '(Sum) Contact Contributions: Total Amount' field in the dropdown menu.

Third and final filter: apply a Having filter

11. When you're ready to view your search results, select **Search**.

Tip: You can also toggle on the "Auto" feature to automatically update your search results each time you make a change.

(BETA) Search Builder

Contacts:

Search for: Contacts

With (required) Contact Contributions

AND Add Condition

With (required) Contact Tags

AND Add Condition

With (optional) Entity

Group By: Display Name

Field Transformations

Query Info

Where

fx Date Received

Is Between

Pick Date 01/01/2022

Pick Date 12/31/2022

And fx Tag Name = Casino Night

AND Select field

Having

Having (Sum) Contact Co ≥ 100

AND Select field

ACTION SEARCH AUTO

(List) Contact ID x Display Name x (List) Contact Tags: Tag Name x (Sum) Contact Contributions: Total Amount x + Add

Search for results

How-to Video

Need a walk-through of the steps above? Check out this short video tutorial on creating the above example report in Search Builder.

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Performing Actions on Search Results

Once you're satisfied with your Search Builder results, you can perform a series of actions on your search results which will appear listed along the bottom of your screen.

12. Select one or more of your search result rows.

Wellness Avenue Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail Settings Help DMSCA DMSCA

(BETA) Search Builder

Contacts: Search for Contacts

With (required) Contact Contributions

AND+ Add Condition

Where: Date Received

Is Between Pick Date 01/01/2022 Pick Date 12/31/2022

AND+ Tag Name = Casino Night

AND+ Select field

Having: (Sum) Contact Co... 100

AND+ Select field

Field Transformations

Query Info

	{[id]} Contact ID	{[Display Name]}	{[id]} Contact Tags: Tag Name	{[Sum]} Contact Contributions: Total Amount
<input checked="" type="checkbox"/>	307	Amelie A Poulin	Casino Night	\$ 4,670.69
<input checked="" type="checkbox"/>	388	Better Carpet	Casino Night	\$ 200.00
<input checked="" type="checkbox"/>	451	Bill Koztenko	Casino Night	\$ 500.00
<input checked="" type="checkbox"/>	400	Brown Bag	Casino Night	\$ 500.00
<input checked="" type="checkbox"/>	320	Daniel Politsani	Casino Night	\$ 6,500.00
<input checked="" type="checkbox"/>	354	Darcy McGee	Casino Night	\$ 483.00
<input checked="" type="checkbox"/>	276	Elize Farley	Casino Night	\$ 160.00
<input checked="" type="checkbox"/>	333	Karolina Maya	Casino Night	\$ 382.37
<input checked="" type="checkbox"/>	326	Laura Pepplatt	Casino Night	\$ 2,030.20
<input checked="" type="checkbox"/>	574	Mr. Beth Kaak	Casino Night	\$ 250.00
<input checked="" type="checkbox"/>	489	Mr. Kevin Needham	Casino Night	\$ 770.00
<input checked="" type="checkbox"/>	373	Ms. Nancy C	Casino Night	\$ 1,825.00
<input checked="" type="checkbox"/>	416	Ms. Nina Can	Casino Night	\$ 235.00
<input checked="" type="checkbox"/>	444	Natalie Koztenko	Casino Night	\$ 475.00
<input checked="" type="checkbox"/>	323	Nicole Lam	Casino Night	\$ 57,540.00
<input checked="" type="checkbox"/>	415	Nina Flowers Inc.	Casino Night	\$ 120.00
<input checked="" type="checkbox"/>	334	No Frits	Casino Night	\$ 6,000.00
<input checked="" type="checkbox"/>	403	Noboru Kagamida	Casino Night	\$ 800.00
<input checked="" type="checkbox"/>	309	Valeria Gonzalez	Casino Night	\$ 1,000.00

19 selected of 19 results

Page Size 50

Select your desired results

13. Select **Action** to see a list of the available actions you can perform on these results.

Note: The **Action** list will differ depending on the main entity selected (i.e., *Contacts* vs. *Contributions*)

Wellness Avenue Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail Settings Help DMSCA DMSCA

(BETA) Search Builder

Contacts: Search for: Contacts

With (required) Contact Contributions

Where: Date Received

Is Between Pick Date 01/01/2022 Pick Date 12/31/2022

And Tag Name Casino Night

Having: (Sum) Contact Co >= 100

Group By: Display Name

Field Transformations

Query Info

☑	(List) Contact ID	(List) Contact Tags: Tag Name	(Sum) Contact Contributions: Total Amount
<input checked="" type="checkbox"/>	307	Amelie A Poulin	Casino Night \$ 4,670.69
<input checked="" type="checkbox"/>	586	Better Carpet	Casino Night \$ 200.00
<input checked="" type="checkbox"/>	451	Bill Kostenko	Casino Night \$ 500.00
<input checked="" type="checkbox"/>	400	Brown Bag	Casino Night \$ 500.00
<input checked="" type="checkbox"/>	320	Daniel Polizani	Casino Night \$ 6,500.00
<input checked="" type="checkbox"/>	354	Darcy McGee	Casino Night \$ 483.00
<input checked="" type="checkbox"/>	276	Eloze Farley	Casino Night \$ 160.00
<input checked="" type="checkbox"/>	333	Karolina Mya	Casino Night \$ 582.37
<input checked="" type="checkbox"/>	326	Laura Peppiatt	Casino Night \$ 2,030.20
<input checked="" type="checkbox"/>	574	Mr. Ben Kaak	Casino Night \$ 250.00
<input checked="" type="checkbox"/>	439	Mr. Kevin Needham	Casino Night \$ 770.00
<input checked="" type="checkbox"/>	373	Ms. Nancy C	Casino Night \$ 1,625.00
<input checked="" type="checkbox"/>	416	Ms. Nina Can	Casino Night \$ 235.00
<input checked="" type="checkbox"/>	484	Natalie Kostenko	Casino Night \$ 475.00
<input checked="" type="checkbox"/>	323	Nicole Lam	Casino Night \$ 57,940.00
<input checked="" type="checkbox"/>	415	Nina Flowers Inc.	Casino Night \$ 120.00
<input checked="" type="checkbox"/>	334	No Frills	Casino Night \$ 6,000.00
<input checked="" type="checkbox"/>	403	Noboru Kagamida	Casino Night \$ 800.00
<input checked="" type="checkbox"/>	309	Valeria Gonzalez	Casino Night \$ 1,000.00

19 selected of 19 results

Perform an action on your search results

Actions List for Contacts (Main Entity):

- **Add Contacts to Group:** Add the selected Contact/s to a new/existing (regular) Group.
- **Create Mail Merge:** Create a mail merge (i.e., printed document) to send to your selected Contact/s.
- **Dedupe- Merge 2 Contacts:** If only two Contacts are selected, merge them into a single Contact record.
- **Delete Contacts:** Delete the selected Contact/s.
- **Download Spreadsheet:** Download a spreadsheet of your search results (formats available: .CSV, .xlxs, .ods, .pdf).
- **Email- schedule/send via CanadaHelps Mail:** Send a DMS Mail to your selected Contact/s.
- **Export Contacts:** Export the selected Contacts as a .CSV file (with the option to select the exact fields for export).
- **Print Mailing Labels:** Print Mailing Labels for the selected Contact/s.
- **Remove Contacts from Group:** Remove the selected Contact/s from an existing Group or Smart Group.
- **Send Regular Email:** Send a regular email to your selected Contact/s.
- **Tag-Add/Remove Tags:** Add or remove tags from your selected Contact/s.
- **Update Contacts:** Update the selected Contact/s with selected values (e.g., Do not email).

Tip: In our example scenario, we might be interested in adding all of these Contacts to a Group, which we can use as our mailing list when sending our targeted DMS Mail. Or, if we're ready to send it, we can also create/send a DMS Mail from here directly as well.

Actions List for Contributions (Main Entity):

- **Delete Contributions:** delete the selected Contribution/s from your DMS (Note: This action is permanent).
- **Download Spreadsheet:** Download a spreadsheet of your search results (formats available: .CSV, .xlsx, .ods, .pdf).
- **Export Contributions:** Export the selected Contribution/s as a .CSV file (with the option to select the exact fields for export).
- **Send Thank You:** Send a Thank You (email or download) to the Contact/s associated with the selected Contribution/s.
- **Update Contributions:** Update certain aspects of the selected Contribution/s (e.g., campaign name).

What's Next?

Reminder:

At the moment, Search Builder reports don't save in your [main DMS Reports tab](#). So, to save a Search Builder Report and come back to it anytime, simply **bookmark its exact URL**.

Clicking on the URL will bring you back to your report with all of your previously-selected columns/filters applied.

