

Search Builder

<i>Speech</i>	<i>Cursor Actions</i>
Search Builder lets you search for contacts based on any criteria in the database.	Start in Contact List. Point to Search Builder. Open Search Builder.
Perhaps you are preparing your holiday campaign, and you need to create a list of potential donors to solicit. You want to send solicitation letters to anyone who has donated in the past year, or attended your fall fundraiser, but you don't want to solicit your board members. In that case, the three criteria you have to set are: <ol style="list-style-type: none"> 1. has donated in the past year, 2. has attended fall fundraiser, and 3. is not a board member. 	Show slide.
When Search Builder was opened, it automatically opened the window for defining a new search criterion. First we'll find the people who donated in the last year, so we can name this criterion "donated in the last year." In search builder, criterion names are optional, but are often convenient to help you remember the structure of your search. To find those contacts, choose a Criterion Type of <i>Donation: made donations matching assorted criteria</i> . Now you can define all the criteria for your donation search.	Click New Criterion. Name "Donated in the last year." Choose Criterion: Donation: Made donations matching assorted criteria.
For this example, choose Time Period, Prior 366 days, to find contacts who donated in the past year.	Choose time period: prior 366 days.
Click OK to save this criterion.	Click OK.
And now this box represents all the contacts who donated in the past year.	Move first criterion to top left.
Click Search, and Sumac performs the search, showing how many contacts are represented by this criterion. Next we want a search criterion to find contacts who attended our fall fundraiser.	Click Search.
Click New Criterion to create the next search.	Click New Criterion.
Name this search "Attended Fall Fundraiser."	Name "Attended fall fundraiser."
Attendance is tracked using Communication records, so choose a Criterion Type of Communication: contacts sent/received a communication matching assorted criteria.	Choose New, Communication: contact sent/received a communication matching assorted criteria.
Choose the event,	Choose event: Fall Fundraiser.
choose the type of communication.	Choose type of communication: Attended event.
then click OK.	Click OK.

	Move second criteria to below Donation search.
Finally, make a New Criterion to exclude Board Members.	Click New Criterion.
Name this search “not Board Members.” Choose Criterion Type: Contact Type, and choose Board.	Name “not Board Members” Choose Criterion: Contact Type, Contact Type: Board.
Now, the search as it is will find all the contact who <i>are</i> board members, but we want to find all those who are not board members. Every search criterion in Search Builder has a check box to reverse it. Since we want to exclude the Board Members, click this check box to reverse the search, telling Sumac to find everyone who is not a Board Member.	Click reverse the search checkbox.
Click OK.	Click OK, move criterion below other two.
Now that we've set up all the criteria, it's time to connect these searches to produce the final list of contacts to send solicitation letters.	
Select the Donation and Communication search criteria.	Select Donation and Communication criteria.
And click New Connector.	Click New Connector.
For this example, choose an OR connector, since we want to find contacts who donated in the past year, or attended the Fall Fundraiser.	Choose OR.
When you click OK, Sumac creates a new box, which represents a list of contacts who either donated in the last year, or attended the fall fundraiser.	Click OK, move connector box to middle of two search criteria. Point to each criteria.
To exclude the Board Members, select the Board Member criterion, and the OR connector. Click New Connector.	Select Board and OR Connector.
This time choose AND, because we're looking for contacts who either donated or attended AND are not Board Members.	New connector. Choose AND.
This new box represents contacts who have either donated or attended the event, but are not board members.	Hover over final box.
Click Search, and Sumac performs all the searches and shows how many contacts are represented by each criterion.	Click Search. Point to Counts. highlight all counts.
You can see 30 contacts are the ones we want to send the solicitation letter, since they either donated last year or attended the fall fundraiser, and are not board members	Select AND connector.

<p>You can either save this search as a search criteria file on your computer, so that if you want to run this search again next year, you can open the criteria file and find these contacts again.</p>	<p>Point to Save.</p>
<p>Alternatively, you also have the ability to save searches built in Search Builder as a Group in your database. This is very useful if this is a search you'll want to run regularly, perhaps once a month.</p> <p>In either case, Sumac saves the search criteria. It does <i>not</i> save the list of contacts. Each time you use the saved search Sumac re-does all the searching to produce a list of contacts that is correct at that moment. Next year, if you use the search again, it will probably produce a different list of contacts.</p>	<p>Point to Save As Group.</p>
<p>Now that we've found the contacts we want to solicit, select the final criterion that represents that list of contacts, and click the Show 30 Contacts button.</p>	<p>Highlight final criterion. Click Show 30 Contacts button.</p>
<p>Sumac opens the contact list with those 30 contacts showing. You now have all the power of the contacts list window,</p>	<p>Show Contacts list.</p>
<p>so you can send your solicitation letters by paper mail, or by email.</p>	<p>Hover over Mailing, Mail Merge, then Send Bulk Email.</p>
<p><i>Check out more training videos to learn more about Sumac.</i></p>	