

Searching Video 3: Searching in Lists – using Multiple Criteria

<i>Speech</i>	<i>Cursor Actions</i>
<p>This video shows you how to do searches with multiple search criteria. Before watching this video, watch these:</p> <ul style="list-style-type: none"> • Searching 1 – Basic Concept Overview, and • Searching 2 – Searching in lists – using Search Operators 	Show list of training video titles
	Title: Searching Donations
Let's search to find donation records that match our search criteria	Show console, expand Fundraising, click Donations (list must be showing received date, event, fund, and campaign)
Like all other lists, the Donations list has searching above a list of donations.	Point to searching at the top. point to list area in the middle
The Search Type menu in the Donations list holds search criteria that relate to donations, when they were received, the donor's name, donation type, or campaign.	Open Search Type and point to different search options mentioned
If we want to find donations that were made last week, we search by the When Received date field.	Choose Search Type: When Received
You can either specify each date,	Point to date range fields
or use this drop-down menu to choose the time period you're interested in. Choose Last Week, and Sumac fills in the dates of last week.	Open time period drop-down menu, choose Last Week
Click Search, and Sumac finds all the donations received last week!	Click Search, point to search results.
Occasionally, you may need to run more complex searches to find records that meet multiple criteria. For example...	Show title: "Searching with Multiple Criteria"
Perhaps you need to find all donations made in the last month to a certain campaign. In this example, we're looking for a list of donations that match two different criteria: one criterion for donations made in the last month, and another criterion for donations made to a specific campaign.	Show pic, numbering criteria: 1) donations made in the last month 2) donations made to a campaign (be consistent with visual representations used earlier in video, e.g. colour coding, etc.)
First, specify the date range search criterion. For this example, choose a time period of Last Month	Point to searching. Choose Time Period: Last Month
Next, add another criterion to specify the campaign. Click the Plus sign.	Point to Plus button.
and Sumac adds a second criterion for this search.	Point to new Search Type drop-down menu

Notice that you <i>must</i> also specify the connection between these two criteria: “and,” or “or.”	Open connector drop-down. Point to And and Or
For this example, I'll choose to use an “and” connector. We want to find the donations made during the last month AND to a specific campaign.	Choose “And”
Choose the Search Type: Campaign and its Children, then select your Campaign	Choose Search Type: Campaign and its Children, choose Annual Campaign
Click Search, and Sumac finds all the donations in your database that match this time period and this campaign.	Click Search Point to search results list
Let's move on to another example that's a bit more complex. We want to find donations in the last quarter to a specific fund or to a specific event.	
Perhaps we've been raising money for an education fund. We specified the fund in each donation.	show a single donation, and point to the Fund field, which should contain Education Fund
We also held an event about three months ago and received a number of donations. We specified the Event in each donation.	show a single donation, and point to the Event field, which should contain 2014 Gala
Now we want to find all the donations made in the last three months, to either that event, or the fund.	
First, let's set our criterion for donations made to the event. We choose the Search Type: Event, then click Choose Event to select the event we're interested in.	Search Type: Event Event: 2014 Gala
Next, specify the date range of interest. Choose the Search Type: When Received, then set the date range you're interested in. For this example, let's look last quarter.	Click Plus button Set date range for last quarter
Since we want donations either to the fund OR to the event, change the AND to an OR.	change the And to an Or
Now add a criterion to find donations made to the Education Fund. We choose the Search Type: Fund, then choose the Education Fund.	click plus sign Search Type: Fund Fund: Education Fund
Again specify the date range of interest. Click the Plus button, then choose the Search Type: When Received, and set the date range to last quarter	Click Plus button Set date range for last quarter

<p>Now we have four search criteria.</p> <p>Sumac performs AND operations before it performs OR operations, so the first two are grouped together and performed to find donations to an event in a date range. Then the next two search criteria are performed to find donations to a fund in a date range.</p> <p>Then they are all combined together with the OR operator.</p>	<p>point to the ands and ors, and to each of the four criteria as they are mentioned</p> <p>do this very slowly, pausing on each thing</p>
Click Search	Click Search
and Sumac finds all the donations that match the criteria we've specified.	Point to search results.
Now that we've reviewed searching with multiple criteria in the Donations list, let's move on to searching in another list. For this next example, let's review searching in the Memberships list.	<p>Close Donations list.</p> <p>Show console.</p> <p>Expand Specialized.</p> <p>Click Memberships</p>
One of the most common searches run in the Memberships list is searching for memberships that are going to expire soon and haven't renewed their membership yet. For example, perhaps you need to find the memberships that will expire next month so that you can send out renewal notices.	
To perform this search, select the Search Type: Expiring in Date Range,	Choose Search Type: Expiring in Date Range
Then choose the date range you're interested in. For this example, let's just use a time period of "Next Month."	Choose Time Period: Next Month
Sumac fills in the appropriate date range for you.	Point to Date Range fields
You'll also notice that there is a check box here labeled "Not yet renewed." This check box tells Sumac to find only memberships that meet the above criterion, and have not yet been renewed.	Put check mark next to "Not yet renewed"
Click Search, and Sumac finds all the membership records that will expire next month and have not yet been renewed.	
As you can see, the same basic approach to searching is applicable in <i>every single list</i> .	
Searching is always at the top of the list, and the Search button	Point to Search Panel
puts the results here.	Point to list of data.
<i>Check out more training videos to learn more about searching in Sumac!</i>	