

Searching Video 4: Searching in Lists – Tips and Troubleshooting

<i>Speech</i>	<i>Cursor Actions</i>
<p>This video is a quick list of some helpful searching tips. Before watching this video, watch these:</p> <ul style="list-style-type: none"> • Searching 1 – Basic Concept Overview • Searching 2 – Searching in lists – using Search Operators, and • Searching 3 – Searching in Lists – using Multiple Criteria 	<p>Show list of training video titles</p>
<p>Sometimes, you may run a search in Sumac, but find that you get some unexpected results. In these situations, review your search criteria to ensure that they are correct, and reflect what you're trying to find.</p>	<p>Show Title: “Searching Tips”</p>
<p>Here are a few common reasons for unexpected search results:</p>	
<ul style="list-style-type: none"> • Your search criteria are not specific enough. While your criteria may have been set up correctly, the criteria could be too general. <ul style="list-style-type: none"> ◦ Solution: refine and focus your search by including more targeted criteria • Data has been entered into the database differently than you expected, so your search criteria find the wrong thing, or nothing at all. Perhaps you were searching by a campaign when you should be searching by an event. <ul style="list-style-type: none"> ◦ Solution: Talk to your colleagues about how the data is being recorded to ensure that you're searching the appropriate field. • Data has been entered inconsistently. Perhaps you have been entering things one way, but a colleague has entered it another way. As a result, you're only getting part of the data in your results. <ul style="list-style-type: none"> ◦ Solution: find out why the data is inconsistent, and ensure that you and the rest of your team are recording data in the same way. That way, in the future, your search results will be accurate. If you need to fix up historical data, use Sumac's Bulk Edit command to do lots of records at once. 	<p>Title: Common mistakes</p> <p>list each mistake/solution as they are mentioned</p>

<p>Think carefully about what you are looking for. What are the individual criteria of your search? Split your search into individual components – doing this helps you tell Sumac exactly what you want to find.</p> <p>Another good tip to keep in mind is to outline what you want to define in your search <i>first</i>, then work backwards from that. In other words, define what you want your end result to be, then consider what search criteria, connectors, or search operators will get you there. If you outline what you're looking for first, you can set up your search criteria more accurately to ensure that you're getting the results you want.</p>	<p>Show title: “Tips to Remember”</p> <p>List:</p> <ul style="list-style-type: none"> -Think carefully about what you are looking for - What are the individual criteria of your search - Break your search down into individual components -Outline what you want to define in your search <i>first</i>, then work backwards from that
<p>For even more powerful searching, view the how-to video about Search Builder – a special tool that lets you draw the search you want to perform.</p>	
<p><i>Check out more training videos to learn more about Sumac.</i></p>	