# crimson

The main searches in Crimson now automatically save your most recent searches, allow you to save your favorite searches so you can create your own reports, and let you customize the output fields so that your exported results only show the data you select.

We have added multiple search fields to the People and Money Searches such as informal names, all phone numbers, top flags, having all flags, having all keywords, etc.

There is now a **Quick Search** always available at the top of Crimson that allows you to select which search type you want to use via the drop-down menu. To learn more about the quick searches in Crimson, see the **Crimson – Quick Searches** guide on our HelpDesk.

Search Filters
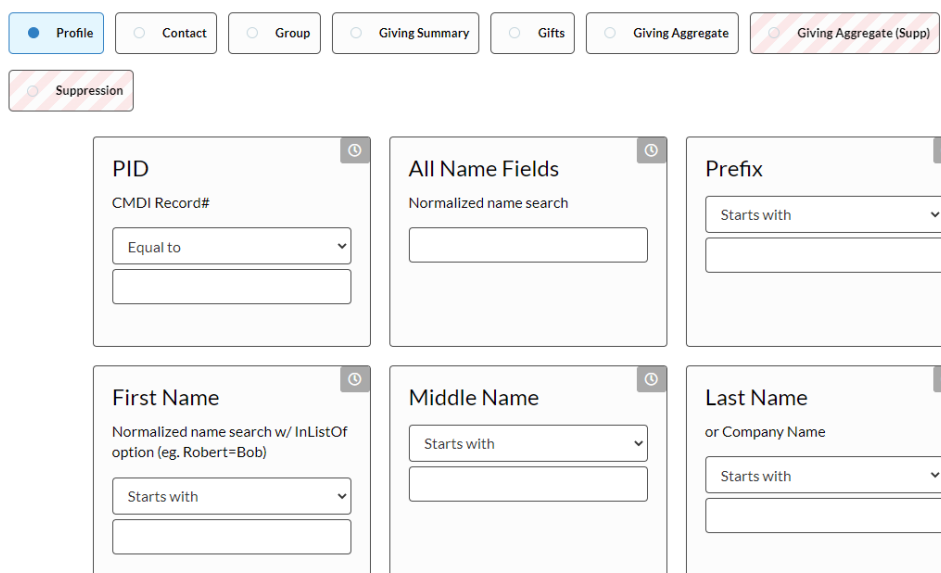
The search filters now display in panel view so that they are more responsive to mobile devices and varying screen sizes. They are also grouped by section so that the number of search fields displayed at one time are limited to minimize the need to scroll and find a field.

To view the selected search fields being used in a particular search, enable the **Selected Only** toggle at the top right hand corner so that it is blue. You can also use the **Search Filters** search to find a particular field to use/view.

Click the button to display the summary for that particular search. It will show you the filters being used and the output fields included in the results.

Output Fields

Now in Crimson, you can control exactly which fields are included in your search's exported results so that you can exclude default data or columns in your excel that you do not need or include new ones.

1. After entering the criteria into the search fields, click the **Output Fields** tab.
2. There, you can select the fields you want included in your output or unselect the ones you do not. When a field is highlighted and bolded in blue, it will be included in your export.
3. Click **Restore** to reset any changes to the output fields and return to the default search results/export options.

Recent Searches

1. Click the **Recent Searches ▲** button at the footer of a search page to see a drop-down of your most recent searches for that particular search only.
2. Once you have selected the recent search you want to run again from the list, the fields will auto-populate and you will need to press the **Run** button.

Saved Searches

Save a Search
1. Enter the desired search filter criteria
2. Click ⊙ to indicate if a saved search field should ask you to select the criteria for that particular field at run time. This allows the saved search to function more like a report because instead of saving the exact criteria that should be used for a saved search every single time, the field is more flexible and can be used with different amounts, dates, codes, etc.
3. Click **Run** to run the search.
4. To save a search, click **Save** after running the search. A summary of the **Filters** used and the **Output Fields** selected will display under the **Search Summary**.
5. Update the title of your saved search in the **Query Name** field. Be sure to click **Save** when done.

Save Search

Search Name

Agg:FundCode(P2022)Agg:Cumu$GreathanEquato(2900)Su

Search Summary

Filters

Giving Aggregate: Agg: Fund Code **P2022**
Giving Aggregate: Agg: Cumulative $ *Greater than/Equal to* **$2,900**
Giving Aggregate (Supp): SuppAgg: Fund Code **G2022**

Output Fields

Record Type
Name
Employment
Salutation
Primary Address
Phones & Email
Primary Contact
Giving Summary
JFC Summary
Total - Active Funds

6. If you need to update the output fields for the results, exit the **Query Save As** page and select the **Output Fields** tab. Select which fields to include in the output results. Click **Save** when done.

Run a Saved Search

7. To run a search that you previously saved, click **Saved Searches**. A list of saved searches for that particular search menu will be displayed. Saved searches are not saved across the different searches so a saved People Search will not be available in the Money Search's **Saved Searches**.

Saved Searches

🕐 All Scheduled Emails   Search... 🔍

👤 **PAC Records**	👤 **Major Donors**	👤 **P2022 Maxed Donors**
Created: 10/17/22 Last Modified: 10/17/22 Last Run: 10/17/22	Created: 10/17/22 Last Modified: 10/17/22 Last Run: 10/17/22	Created: 10/17/22 Last Modified: 10/17/22 Last Run: 10/17/22
🗁 ❞ 🗐 ✖	🗁 ❞ 🗐 ✖	🗁 ❞ 🗐 ✖
🕐 Add Scheduled Email	🕐 Add Scheduled Email	🕐 Add Scheduled Email

Please note, **Saved Searches are unique to each user and currently cannot be shared across a database between different logins.

8. Click 🗁 to open a saved search and auto-populate the search fields with what was previously saved. You can make edits to that saved search and click the **Save** button to update it. Then click **Run** to run the saved search.

9. Click ❞ to see a summary of that saved search and view the **Filters** and **Output Fields** used.

10. Click 🗐 to duplicate a saved search so that you can modify it and then click the **Save** button to save that as a new saved search.

11. Click ![x button] to delete that saved search.

Additional Search Buttons

There are other additional search buttons available now in Crimson.

- The **New Search** button will reset all search fields and start a brand new search.
- The **Restore** button will restore a saved search or a recent search's criteria if edits were made to the original search.

Once you have your results, you can use the ![gear] button in the top left to manage the columns.

- Click the check boxes to remove or add a column to the results and drag the column names to change the order they appear.
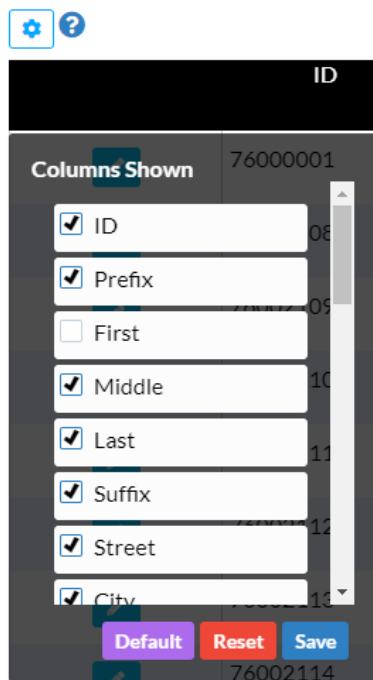
- Click save to save the order and selection as your column preferences for future searches.
- Click reset to revert back to Crimson's default columns and order.

Lastly, you can use the new **Mail Merge** tool in Crimson with your People or Money search results to create letters. To learn more about the mail merge tool in Crimson, see the **Crimson – Mail Merge Tool** guide on our HelpDesk.