crimson

People Search

Click the ![search icon] to run the **People Search**, available in the **Navigation Dashboard Bar** on the **People Dashboard** and the **Fundraising Dashboard**.

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 Search such as informal name, all phone numbers, top flags, having all flags, having all keywords, etc.

There is now a **Quick Search** tool always available at the top of Crimson that allows you to select which search type you want to use via the drop-down menu. Use the **Quick People Search** to find a specific record or use the **Filtered** search to find a list of records.

Quick People Search

Use the **Quick People Search** tool by searching for the PID, First Name and/or Last Name, or part of the Organization Name. You can also search for Flags, Keywords, City, State, and Zip Code. To learn more about the **Quick Search**, see the **Crimson – Quick Searches** guide on the HelpDesk.


The **All Name Fields** search field normalizes the name you enter in the **Quick People Search** and tries to look for that record using a combination of all name fields and not just combine first and last name.

Detailed Filtered People Search

Use the detailed **Filtered** to find either a particular record or a group of records. The filtered search helps produce call lists, mailing lists, email lists, and more. Below are helpful tips on using the filters:

- Click on the different Filter Groups at the top to view their corresponding filter options.
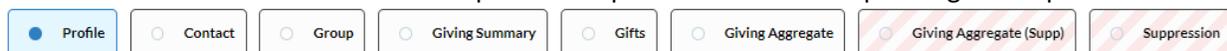
- Enter look-up criteria based on any combination of options.

- Search with partial information. For example, search for part of a first and last name by using the **Starts with** option from each field's drop down menu.

- By changing **Starts with** to **Contains** you can search for a string of characters anywhere in the field. For example, if you were looking for a PAC record with "Health" in the name somewhere, the **Contains** search option would allow a search anywhere in the **Last Name**.
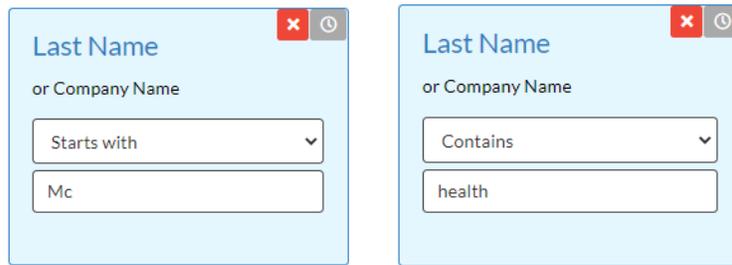
- Enter criteria in the **Suppression** Filter Group to exclude records from a search. For example, enter **Flag** "in list of" "DNM, DNC" (common for Do Not Mail or Do Not Call) to exclude records with those flags from the results.

  o If you are using the **Channel Suppression Flag** setting, you can use the **Apply Channel Suppression Flags** filter. This will suppress all flags marked as Channel Suppression flags in **People Settings** from your results. Please see the **How to Use Channel Suppression Flags FAQ** on the HelpDesk for more details.

- Search for records based on dollar amounts and dates in the **Giving Summary** and **Gift** sections. This includes options to search for amounts that are **equal to**, **greater than or equal to**, **less than or equal to**, **not equal to** or **between** ranges. The **Giving Summary** allows you to search by totals and historical giving details (ie. first gift, most recent gift, and highest gift) while the **Gift** section searches for people records related to a particular gift.

- To view the selected search fields being used, enable the **Selected Only** toggle at the top right hand corner so that it is blue. Use the **Search Filters** bar 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.

- Click the button within a used search field to reset and clear out that filter.

- At any time clicking the red button at the bottom right corner of the screen will clear all of your selection criteria and allow you to start a new search.

Recent Searches

1. Click the button at the footer of the People Search to see a drop-down of your most recent searches for the People 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 button.

Saved Searches

Save a Search

1. Enter the desired search filter criteria.

2. Click [icon] 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 to work 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 the saved search in the **Query Name** field. Be sure to click **Save** in the **Query Save As** window when done.

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.
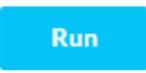
Run a Saved Search

1. To run a search that you previously saved, click **Saved Searches**. A list of saved searches for the People Search 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**.

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

2. Click [icon] 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.

3. Click [icon] to see a summary of that saved search and view the **Filters** and **Output Fields** used.

4. Click [icon] 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.

5. Click to delete that saved search.

Output Fields
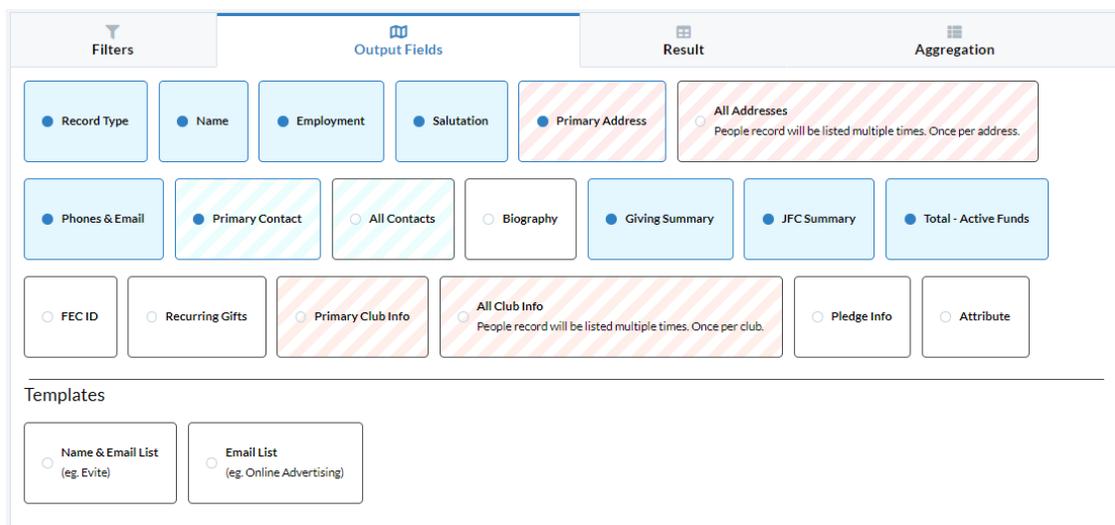
The **Output Fields** can be used to select which data you want to include in the results for export. This is helpful in producing lists that will have information you need and exclude information you do not need.

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 **Revert to Default** to reset any changes to the output fields and return to the default search results/export options.

Results

- Enter the selection criteria, and then click the **Run** button in the bottom right corner.
- The number of records in your results will appear in the bottom left of the page **262 records** .
- Click a column header, like the **Last Name** column, to sort results.

- Click on the ⚙ button in the top left to manage the columns.

  - o Click the check boxes to remove or add a column to the results and drag the column names to change the order they appear.

  - o Click save to save the order and selection as your column preferences for future searches.
  - o Click reset to revert to Crimson's default columns and order.

- Any record in the list can be opened by double-clicking on it or clicking the blue ✏ button.

- Click the ☰▲ button next to the **Export** button to see a list of action items that can be applied to your search results:

  - o **Export** – The regular export allows you to export the entire results to an excel file.
  - o **Export by Channel** – See the Crimson - People Search Advanced Export by Channel guide.
  - o **Mass Append** – This allows you to mass append **Flags**, **Keywords**, **Notes**, **Tasks**, or **Events** to all records in the results. See the **Crimson – Mass Append** guide for further details.
  - o **Print** – This generates **Full Profile Call Sheets** for each record in the results.
  - o **Print Summary** – This creates a summary report call sheet for all records in the results.
  - o **Map It** – This shows the results on a map window that allows you to zoom in and out on locations. You can click a pin to see an overview of the associated People Record.
  - o **Mail Merge –** This allows you to generate letters by merging the results into a letter template you have uploaded into Crimson. See the **Crimson: Mail Merge Tool** guide.

- 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.

A note about People Searches:

- The results of People Searches include each record that fits the selection criteria.
- Each unique record as identified by People Identification # (PID) will appear only once (with the exception of the **All Address** search option under the **Contacts** section – see the **[Crimson People Search – Search All Addresses](#)** guide for more details).
- Some of the selection options are based on transaction criteria. For example, the results of a search for people with donations that have a particular source code will list a donor once, even if that donor made multiple donations with that source code.
- To see an output of each donation please use **Money Search** on the **Navigation Dashboard Bar** in the **Fundraising Dashboard**. This search function looks for transactions that meet the selected criteria. If a donor meets the criteria for multiple donations, they will be listed multiple times and the output will include a Money Identification # (MID) for each.