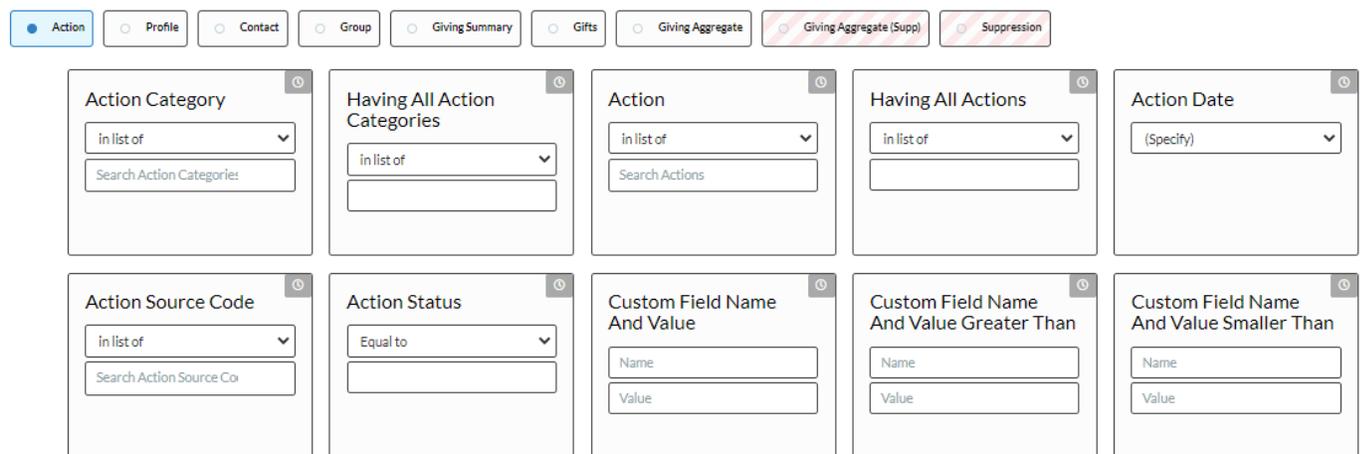


Running a search for Actions is similar to all other searches found throughout Crimson, with filters designed specifically for Actions. This tool will allow you to search for Actions assigned to People Records.

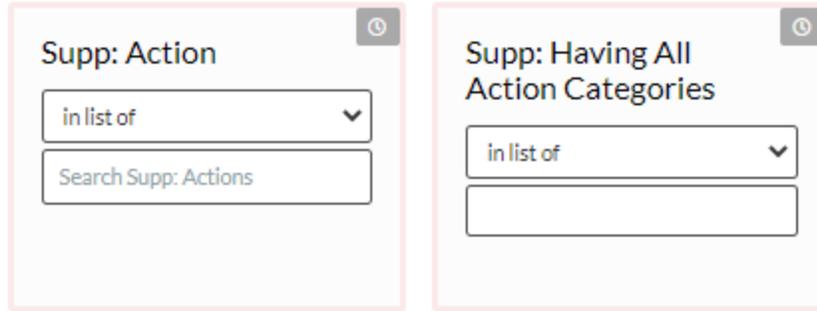
- To find the Action Search, go to the People Dashboard and click on the  icon in the Navigation Bar.
- The search will provide transactional results, meaning a People Record may appear multiple times if they have multiple actions that match the filters.



The screenshot displays the Action Search filter interface. At the top, there is a navigation bar with buttons for 'Action', 'Profile', 'Contact', 'Group', 'Giving Summary', 'Gifts', 'Giving Aggregate', 'Giving Aggregate (Supp)', and 'Suppression'. Below this are ten filter panels arranged in two rows of five. Each panel has a title, a dropdown menu, and a search input field. The filters are: Action Category, Having All Action Categories, Action, Having All Actions, Action Date, Action Source Code, Action Status, Custom Field Name And Value, Custom Field Name And Value Greater Than, and Custom Field Name And Value Smaller Than.

### Action Filters

- Action Category – Search for actions within an Action Category.
- Action – Search specific action(s).
- Having All Action Categories and Having All Actions – Similar to the above, but you are searching for what matches ALL of the categories or actions that you list.
- Action Date – Date or date range of the action(s).
- Action Source Code – Action with a specific source code.
- Custom Field Name and Value – Search by the Custom Fields created for the action(s). First, add the Custom Field name in the first box, then the second in the Value for the field. These must be identical to what is in Action Settings.
- Custom Field Name and Value Greater Than and Custom Field Name and Value Smaller Than – Same as above but will search for actions that have field value that is greater or smaller than the value entered.
- There are also two Suppression filters
  - Action – suppresses any desired actions.
  - Having All Action Categories – suppresses People Records that have all actions listed.



When you run the Action Search, your results will populate with the actions that fit the selected filters. The results will display the **Action ID**, **Action Category**, **Action**, and the **Date** the Action was assigned. You will also see information of the People Record displayed.

Action Search

**Filters** **Output Fields** **Result**

ID	ActionCategory	Action	ActionDate	PID	Prefix
1	Volunteer	Check-in	10/4/22	76002209	Mr.
2	Volunteer	Hosted Committee	10/4/22	76002254	
3	Meeting	Meeting	10/4/22	76003000	
4	Event	Dinner	10/4/22	76003326	

« < 1 > » 10 Items per page 1-4 of 4 items

NOTE: For more information on Actions, see [Crimson: Actions](#).