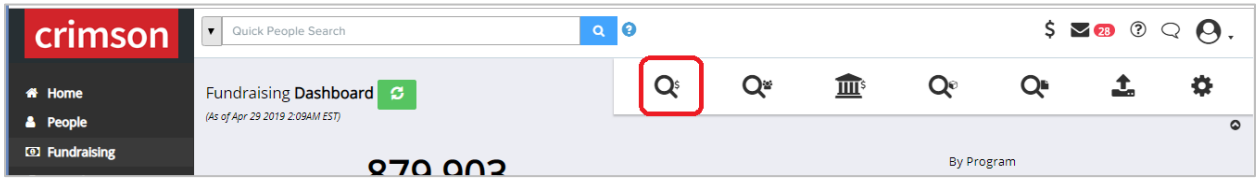
Money Search

The **Money Search** is available in the **Navigation Dashboard Bar** on the **Fundraising Dashboard.**



The main searches in Crimson 3 auto save your 10 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.

There is a **Quick Search** tool fixed 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 Money Search** to find a specific record or use the **Filtered** search to find a list of records.

Difference between the People Search and Money Search

The **People Search** allows you to search for people records (prospects, donors, and volunteers) and provides you with contact details about those records as well as summary contribution data.

The **Money Search** allows you to search for contributions and provides you with the transaction details for each gift. If a donor meets the search criteria for multiple donations, they will be listed numerous times in the **Money Search** results and the output will include a MID (Money Identification #) for each.

Quick Money Search

Use the **Quick Money Search** tool by searching for the PID, First Name and/or Last Name, part of the Organization Name, Batch Numbers, and Batch Dates. You can also search for Flags, Keywords, City, State, and Zip Code. To learn more about the **Quick Search**, see the **Crimson 3 – Quick Searches** guide.

The **"All Name Fields"** search field normalizes the name you enter in the **Quick Money Search** and tries to look for that record using a combination of all name fields.

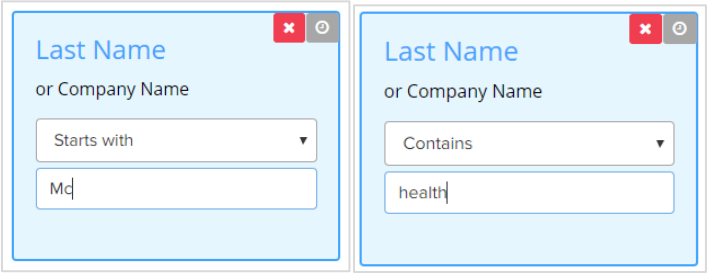
Detailed Filtered Search

The detailed **Filtered** search can be used to find either a specific gift or a group of contributions. The filtered search is helpful in producing a list of all donations from a single donor, donations belonging to a specific source code, event, and much more. Below are helpful tips when running a Filtered search:

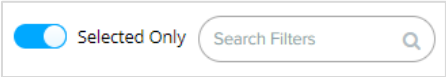
- Click on the different Filter Groups at the top to view their corresponding filter options.

- You can look-up criteria based on any combination of options.

- Search with partial information. For example, search for part of a name by using the **Starts with** option from the 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, the **Contains** search option would search for that word to occur anywhere in the **Last Name**.



- Search for gifts based on transaction details such as batch date, amount, fundraising codes (Fund Codes, Programs, Initiatives, and Source Codes), payment methods, and tracking #s in the **Gifts** filter. 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.
- Enter criteria in the **Suppression** section to exclude records from a search. For example, under **Flag** select the drop-down option "in list of" and list "DNM, DNC" (common for Do Not Mail and Do Not Call) to exclude any donations from people records that have those flags from the results.
    - 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.
- To view the selected search fields being used, 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.
- Click the button within a search field to reset and clear out that filter.
- At any time clicking the red Reset 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 Recent Searches button at the footer of the Money Search to see a drop-down of your most recent searches for the Money 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.

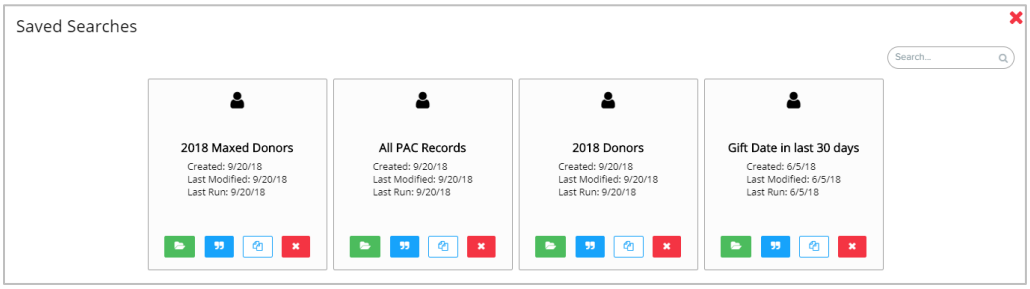
Saved Searches

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** 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

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



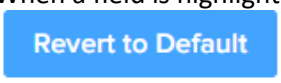
Please note, **Saved Searches are unique to each user and currently cannot be shared across a database between different logins.

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 to delete that saved search.

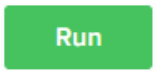
Output Fields

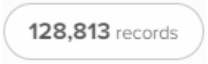
The **Output Fields** can be used to select which data you want to include in the results for export. This is helpful in producing lists that will have information you need and exclude information you do not need.

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 

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

Results

- Once the selection criteria has been entered, click the green 

button in the bottom right corner.
- The number of records in your results will appear in the bottom left of the page 

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- Click a column header, like **Batch Date**, to sort results.
- Click on the 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 to Crimson's default columns and order.

- Any record in the list can be opened by double-clicking on it or clicking the green button.
- Click the button next to the **Export** button to see a list of action items that can be applied to your search results:
  - **Mass Append** – This allows you to mass append **Exception Codes** to all records in the results. See the **Crimson 3 – Exception Codes** guide for further details.
  - **Mail Merge –** This allows you to generate letters by merging the results into a letter template you have uploaded into Crimson. See the **Crimson 3: 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.