

Finding Contacts

Setup: make sure that the contacts list is showing first name, last name, and contact types.

Introduction

This lesson discusses how you can use Sumac to find a single contact or a group of contacts that meet your specific search criteria.

Before viewing this video, you should view:

Lesson 1 *Sumac Basics for All Users*

Lesson 2 *Communications*

Lesson 3 *Single Contact Record*

Lesson 4 *Contacts List*

Approaches to Searching

There are four basic approaches to finding contacts:

First, you can use any other list to find information about some contacts. Then tell Sumac to show you the related contacts.

Second, within the contacts list, you can show columns holding any data in a contact record. Then sort and search within a column that holds data about a contact.

Third, the contacts list supports several types of searches, which can be combined using a General Control.

Finally, you can use Search Builder to graphically construct a search.

Use Other Lists To Show Contacts

Most Sumac lists allow you to show the contacts related to the data in the list.

For example, to find people who were invited to a particular event, you could find the communications of type Invitation for that event, then have Sumac show you the contacts related to the communications.

What if you want to find people who made individual donations to a particular fund?

Open the donations list, specify the donations that you want to find **[choose a donation type and a fund]**. **Click Search** to find the donations.

Now choose all the donations that were found **[click Select All]**, and click to show the contacts **[click Show Contact(s)]**. Since donation records can refer to up to four

contacts, Sumac asks which contacts to show **[choose only Donor]**. Then shows them when you **click OK**.

Sumac shows the contacts by opening the contacts list with only the relevant contacts visible. Note that the donations list is still active behind the contacts list **[click to close contacts list, pause, click to close the donations list]**.

Locate A Single Contact in the Contacts List

The next searching techniques all work from within the contacts list. So **open the contacts list**.

In the contacts list, you can use a column to show any piece of data that is in a contact record. If you want to find all contacts with a particular value in a field, show the column, then sort by that column and key in what you are looking for.

For example, to find a person whose first name is Sandy, **click to sort by first name**, then **key in sandy** and Sumac scrolls in the list to the first contact with the name sandy.

Perhaps you now want to find people whose gender is male. **Show the Gender column** in the contacts list, **click** to sort it, then **type m**. Sumac scrolls to the first person whose gender is male.

Searching In The Contacts List

Recall that each contact **[double click a contact and point at contact types]** can have one or more contact types. Let's find contacts with different contact types.

First find artists. The contacts list can do several types of searches **[pull down the Search Type menu]**. **Choose contact type artist** then **click Search**.

Notice that when you do a search, Sumac shortens the list of contacts so that only those matching your search criteria appear in the list. **[point to status bar]** You can see how many there are by reading the status bar at the bottom of the list window.

Now find board members. **[choose Board contact type, then click Search]**

Notice that Sumac replaced the list of artists with a list of board members.

General Control

What if you did not want to replace the list of artists by a list of board members, but instead you want to append the list of board members to the list of artists, to create a single combined list?

First, **click Undo**, to return to the list of artists. Then change the General Control **[show choices in General Control and point to them while talking]**. This

drop-down menu lets you choose which contacts should be searched – either all of them, or only those already showing in the list. It also lets you replace the list, append to the list, or remove from the list.

To append the list of board members to the list of artists, **choose Search All Contacts, Append Matching Ones To The List**. Then **click Search**. Recall that there are 12 board members but Sumac only added 10 to the list. This is because two contact, who are both artists and board members, were already showing in the list.

What if you wanted to remove board members from the list of artists, to produce a list of artists who are not also board members. **Undo** the search again, returning to a list of artists. **Change the General Control** to remove board members from the list. **Click Search**, and Sumac shortens the list of contacts by removing board members.

Sometimes, as you do multi-step searches, you may lose track of what you have done. The Search Log can be used **[click Search Log]** to show what you have done to get the list of contacts showing in the contacts list. **[close Search Log][reset General Control to first entry]**

The Search Type menu

The search type menu lets you do several types of searches. **[pull down the menu]**
[explain these searches as they are mentioned]

All Contacts shows all contacts in the database

Contact Type shows contacts of the specified contact type. You did this several times when looking for board members and artists.

Field Search lets you search for values in any field in contact records. For example, to find contacts living in Ontario, you might choose Residence Province starts with ON.

Outbound Communications finds contacts whose records indicate they want to receive the chosen type of outbound communications, perhaps your monthly newsletter

Historical Communication finds contacts for whom there is a communication record with the specified communication type and event. Perhaps who was invited to a particular event.

Related Contacts shows contacts who have a specified relationship to any contact or to only those showing in the list

Attended An Event finds contacts who attended the selected event.

Group finds contacts that match the search criteria specified by a group. A group is a search constructed using Search Builder and saved in the database. Search Builder is discussed later.

IDs File finds contacts whose IDs are in the first column of the tab-delimited text file. Reports from Sumac often put contact IDs in the first column of the report, so this type of search lets you find the contacts who appear in a report

Filter Households removes either households whose members are showing or members whose households are showing in the list. This feature enables you to prevent mailings from going to both a household and to each individual in the household.

Preferred Medium contacts who have indicated a preference for the chosen medium. Recall that Preferred Medium can be specified in Contact Facts.

Volunteer Type is much like searching for contact types, except it searches based on Volunteer types.

Member Directory Field is only available if you have the Sumac Membership module. It allows you to search in fields you have added to the membership directory.

Search Builder

The last method for finding contacts is to use Search Builder. It allows you to graphically construct searches which find contacts based on almost any data in the Sumac database. The searches are built from individual search criteria, and the search criteria can be connected together to build more complex searches.

Contact Type Searches

Find board members and artists – the same searches you did before. Only this time use Search Builder.

Click Search Builder, then **click** to indicate you want to create a **New** search.

From the Search Type drop-down menu, **choose contact type, and pick artist. Click OK**. Sumac shows the search criterion in a box.

Search Builder always places new boxes in the same place – the middle at the bottom – so move the box out of the way. **Create another search criterion to find board members.[move it into place]**

Now combine the two searches to find contacts who are either artists or board members. **Click to select one search, shift click to select the other, then click New Connector**. Choose how to connect the two searches – in this case with Or, since you want to find contacts who are either artists *or* board members. **Click OK** to save the connector, which appears as a blue box.**[move it into place]**

At this point, you have constructed the search. Tell Sumac to do the search. **Click Show Counts**. Sumac does all the searches and shows the number of contacts in each box. **[point while describing this]** There are 30 artists, 12 board members, and 40

contacts who are either artists or board members or both.

Let's modify this search. If you want to see people who are *both* artists and board members, **double click to edit the connector. Change it from an Or to an And. Show Counts** again to see that 2 contacts are both artists and board members.

What if you want to get a list of artists who are not board members. Every search criterion in Search Builder can be reversed to find all *except* the contacts who match the specified search criterion. So **double click the search for board members**, and **click to reverse the search. [click OK to save; click Show Counts]**. Now you have a search that finds contacts who are artists but are not board members.

[from now on, do the actions as described]

Came to event or donated

Here is an example. You wish to search for contacts who attended an event or made a donation in the last two years.

Create a new search. Create a criterion to find contacts who attended an event in the last two years. Create another criterion to find contacts who donated in the last two years. Then combine them with an OR connector.

Needs Thank You Letter

Here is another example.

Perhaps you want to see who needs to be sent a thank you letter. Here is how you would do this.

Create a new search. Create a criterion to find contacts who made a donation in the last month. Create another criterion that finds people who have not received thank you letters in the last month. Combine the two search criteria with an *And* connector.

This search finds people who have recently made a donation but have not recently received a thank you letter.

Buttons

Search Builder allows you to save your search criteria into a file. Click Save, and specify the name of the file to hold the search criteria. Note that saved search criteria files are very small; they do not contain a list of contacts, only the criteria for finding contacts. So if you open the search criteria and repeat the search a week from now, you may get a different list of contacts.

If you are a Sumac administrator, you can also save a Search Builder search as a Group. A group consists of Search Builder criteria that have been saved into the database, making them available to all users. If you click to save the current, you are asked to

specify the type of group and its name. Group types are just a convenience for organizing groups; for example, you may have a group type for mailing lists, another for donation searches, and another for committee and board member lists. When you save the search as a group, it becomes available in the contacts list group searches.

Conclusion

In this lesson you learned how to find contacts in several different ways:

First, you can use any other list to find information about the contacts. Then tell Sumac to show you the related contacts.

Second, within the contacts list, you can show columns holding any data in a contact record. Then sort and search within a column that holds data about a contact.

Third, the contacts list supports several types of searches, which can be combined using a General Control.

The fourth way is to use Search Builder to graphically construct a search.

You should now proceed to other Sumac lessons to learn more about how Sumac can help you every day.