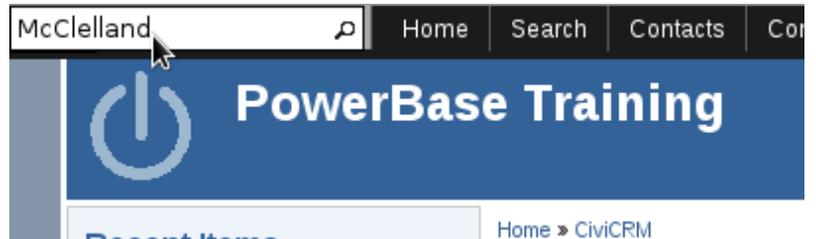
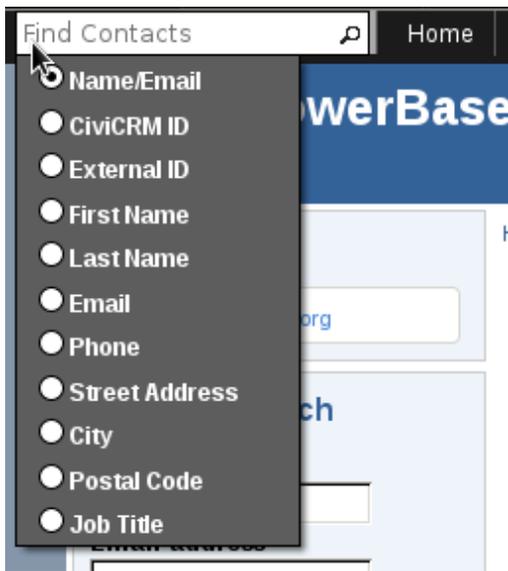


Basic Searching

PowerBase offers many different ways to search from data, ranging from simple to complex. This handout covers the basic forms of searching.

The easiest way to find a contact is using the quick search box in the top left. After clicking in this box, you will see a drop down allowing you to select which fields you want to search.

Name/Email is the default, and most common quick search. It searches any part of a name (first or last) and the email address. To select the default Name/Email, simply start typing the search term you would like to use.



If no records are found, you will be sent to the advanced search screen (more on that below).

[Home](#) > [CiviCRM](#) > [Find Contacts](#)

Advanced Search

A screenshot of the 'Advanced Search' form. The form is titled 'Advanced Search' and has a breadcrumb trail: 'Home > CiviCRM > Find Contacts'. The form is divided into sections: 'Search Criteria' (expanded) and 'Basic Criteria'. Under 'Search Criteria', there are fields for 'Complete OR Partial Name' (containing 'mcclelland'), 'Complete OR Partial Email', 'Search Views' (set to 'Search View: Name Address Constituent type'), and 'Display Results As' (set to 'Contacts'). There are also 'Search' and 'Reset Form' buttons. Under 'Basic Criteria', there are dropdown menus for 'Contact Type(s)', 'Group(s)', and 'Select Tag(s)', and a text field for 'All Tags'. There are also fields for 'Phone Number', 'Phone Location', and 'Phone Type'.

Basic Searching

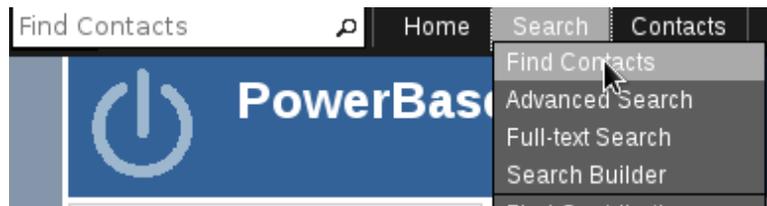
Which is quite confusing until you scroll down to see the message:

i No matches found for:
Name or Email LIKE - 'mcclelland'

Suggestions:

- check your spelling
- try a different spelling or use fewer letters
- if you are searching within a Group or for Tagged contacts, try 'any group' or 'any tag'
- add a [New Individual](#), [Organization](#) or [Household](#)
- make sure you have enough privileges in the access control system

Sometimes you want to search for contacts based on the group they are a member of or a tag. In these cases, using the “Find Contact” search is your best bet.



▼ Edit Search Criteria

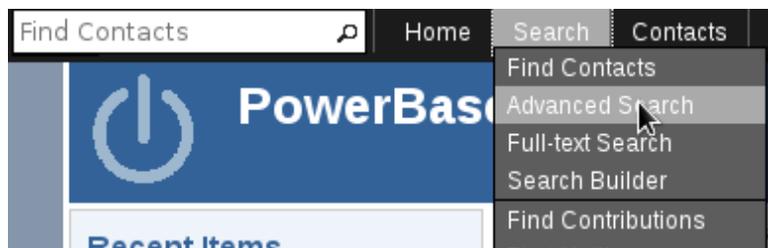
Name or Email

is...

in

with

Lastly, you may want to search on a different field or a set of different fields. In this case, you will want to use the Advanced Search.



Basic Searching

Advanced search has a number of fields and field groups. Like when adding a contact, click the triangle in a field group to expand or collapse it.

In addition, there are a few important fields in the advanced search form:

Advanced Search

The screenshot shows the 'Advanced Search' form. The 'Basic Criteria' section includes fields for 'Complete OR Partial Name', 'Complete OR Partial Email', 'Contact Type(s)', and 'Group(s)'. The 'Search Views' dropdown is set to 'Name Address Constituent type', and the 'Display Results As' dropdown is set to 'Contacts'. The 'Search Operator' is set to 'AND'. There is also a checkbox for 'Search in Trash (deleted contacts)'.

Search Views: When you execute a search, you can control which fields are displayed on the results page by selecting a different Search Views option.

Display results as: By default, you will get one record returned for each individual contact. However, sometimes you need more than one record per contact. For example, if you are searching for contributions, you may want to see all the contribution records, even if there are more than one contribution for a single contact. In these cases, choose a different value from the “Display Results As” field.

Working with Results

Regardless of the search method you use, your results page will look something like the following.

The screenshot shows the search results page. At the top, there is a button labeled 'Edit Search Criteria' circled in red. Below it, the search criteria are displayed: '26 Contacts' and 'Name or Email LIKE - 'smith''. There are radio buttons for 'All 26 records' and '0 Selected records only'. A 'Print' button and a 'Go' button are also visible. Below the search criteria is a navigation bar with letters A through Z and 'All'. Below the navigation bar is a table of results.

<input type="checkbox"/>	Name	Home Address	City	State	Zip	Phone [Primary]	Constituent Type	Action
<input type="checkbox"/>	Smith, Alberta	3703 Baymar Dr	Youngstown	OH	44511	330-555-2234	Constituent	View Edit more ▶
<input type="checkbox"/>	Smith, Alejandra	31 Maranatha Ct Apt 306	Youngstown	OH	44505	330-555-1550	Potential Member	View Edit more ▶

Your search criteria are always repeated for you. In this case, “Name or Email LIKE - 'smith'”. In addition, by clicking the “Edit Search Criteria” title, you can review and repeat your search.

Basic Searching

In addition, you will always have a list of actions that you can carry out on the selected records.

Advanced Search

▸ Edit Search Criteria ?

26 Contacts Name or Email LIKE - 'smith'

Select Records: All 26 records 0 Selected records only

A B C D Q R

Reset all selections

<input type="checkbox"/>	▲ Name		
<input type="checkbox"/>	Smith, A		stown
<input type="checkbox"/>	Smith, A		stown
<input type="checkbox"/>	Smith, B		stown
<input type="checkbox"/>	Smith, B		stown
<input type="checkbox"/>	Smith, C		stown
<input type="checkbox"/>	Smith, C		stown
<input type="checkbox"/>	Smith, C		stown
<input type="checkbox"/>	Smith, C		stown
<input type="checkbox"/>	Smith, C		stown
<input type="checkbox"/>	Smith, James	352 Grant St	Youngstown
<input type="checkbox"/>	Smith, Kay	835 Westport Dr	Youngstown

- actions -
- actions -
- Add Contacts to Event
- Add Contacts to Group
- Add Contacts to Household
- Add Contacts to Organization
- Alter Contact Communication Preferences
- Batch Update via Profile
- Delete Contacts
- Delete Permanently
- Export Contacts
- Mailing Labels
- Map Contacts
- Merge Contacts
- New Smart Group
- Print PDF Letter for Contacts
- Record Activity for Contacts
- Remove Contacts from Group
- Restore Contacts
- Schedule/Send a Mass Mailing
- Send Email to Contacts