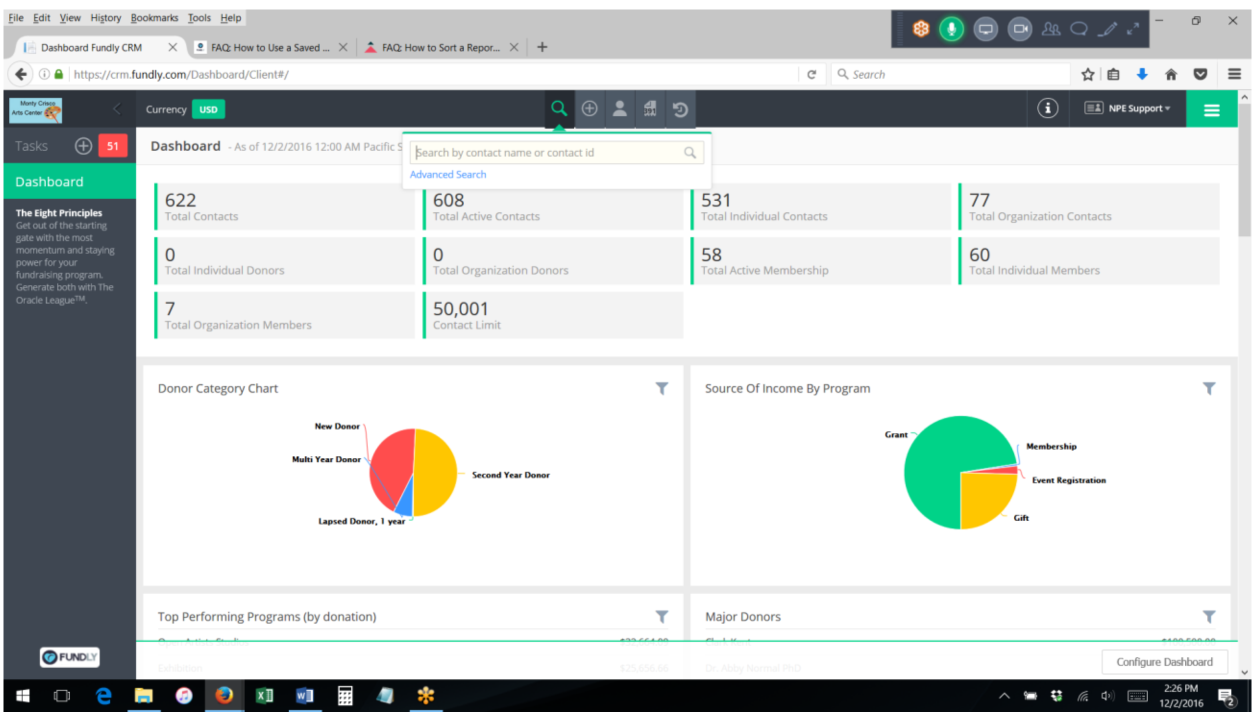
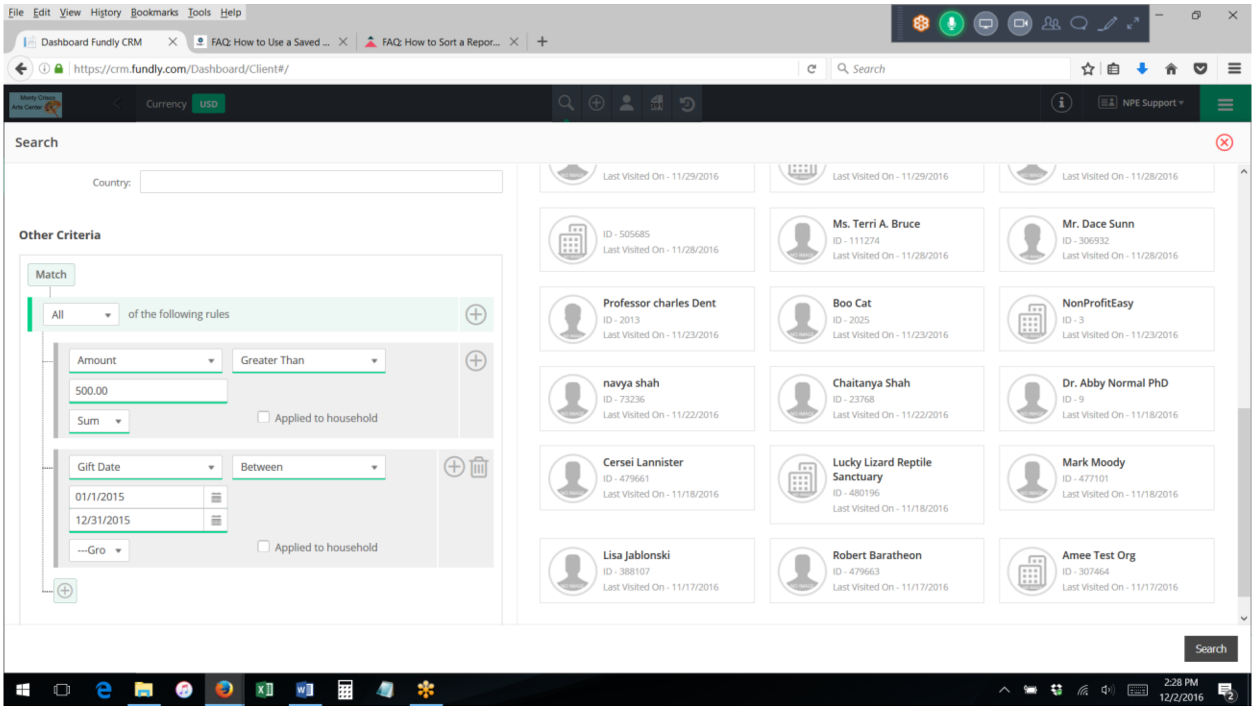
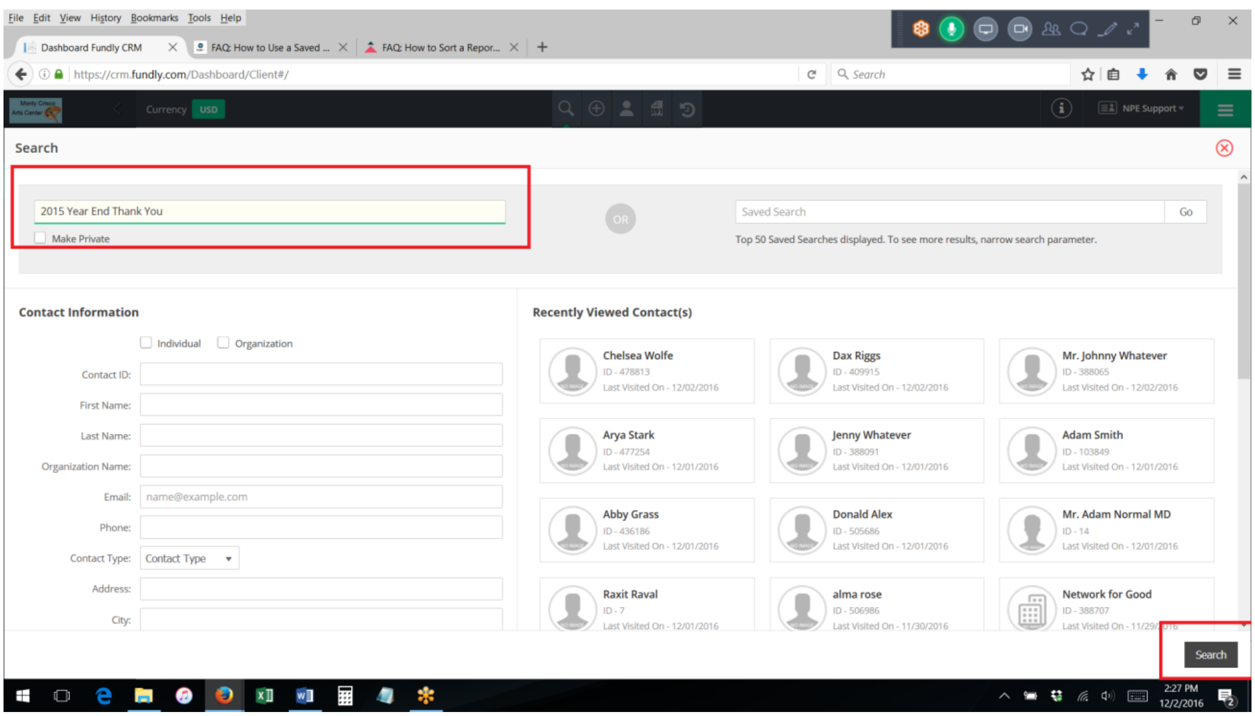
FAQ: How to Use a Saved Search in a Report

1. This FAQ covers how to use a saved search in a report as a filter. This will allow you to set up your reports filters/criteria using the advanced search interface/capabilities and then use that criteria in an enhanced report.
2. Advanced Search allows users to create filters/reports that cannot be created in report filters. For instance, in Exago report filters, it is not possible to filter OUT a contact type (e.g. "exclude everyone with contact type board member"). However, users can filter out contact types in an advanced search. Also, it is not possible to search on a formula/summation in Exago report filters (e.g. "show me everyone who donated more than $500 total during XYZ time period"). However, it is possible to use advanced search to search on summations. By creating an advance search using criteria not possible to use in Exago filters and then using the saved search in your report as the filters/criteria, users can get around Exago reporting limitations.
3. However, users should be aware that using Saved Searches in an enhanced report **creates a Contact List report ONLY**. Users will not be able to see transaction details like donation date and amount, event attended, etc. The advanced search is used to produce a list of contacts (name, address, phone number, etc.) ONLY.
4. To get started, you can use an existing Saved Search (skip to step #6) or create an advanced search with the criteria that you want to use in your report (for example, an advanced search that shows you everyone who donated over $500 in one year).

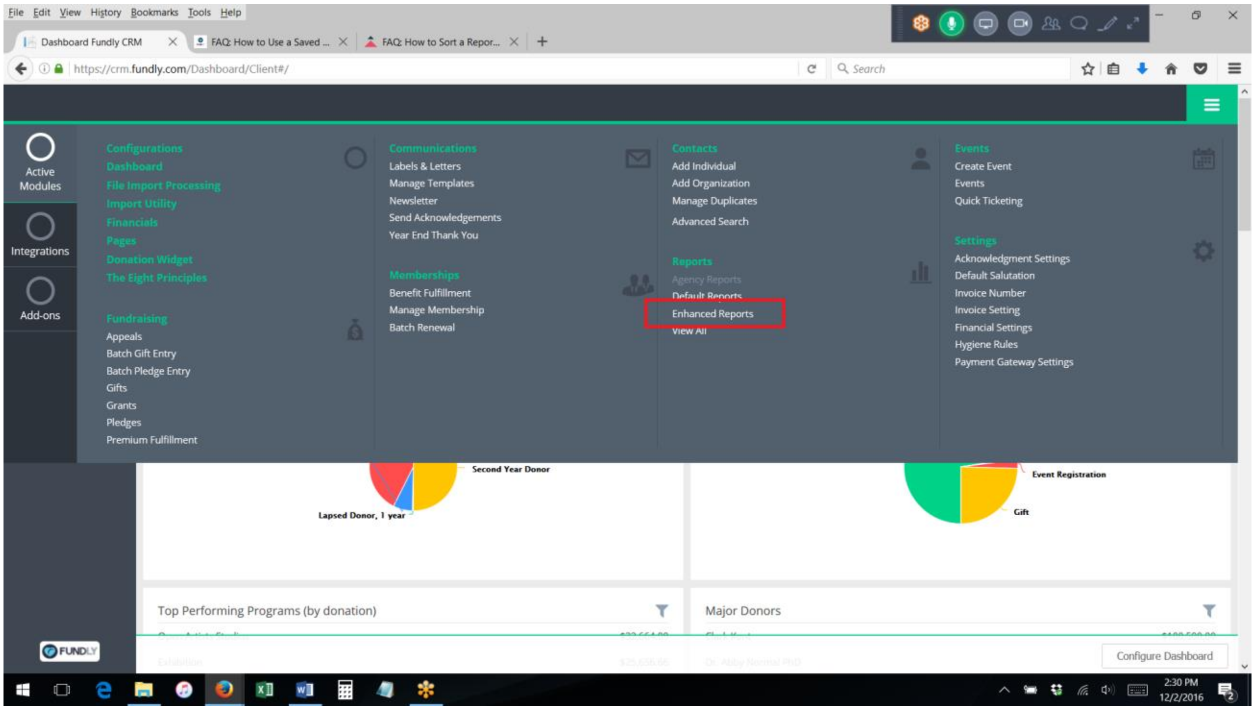




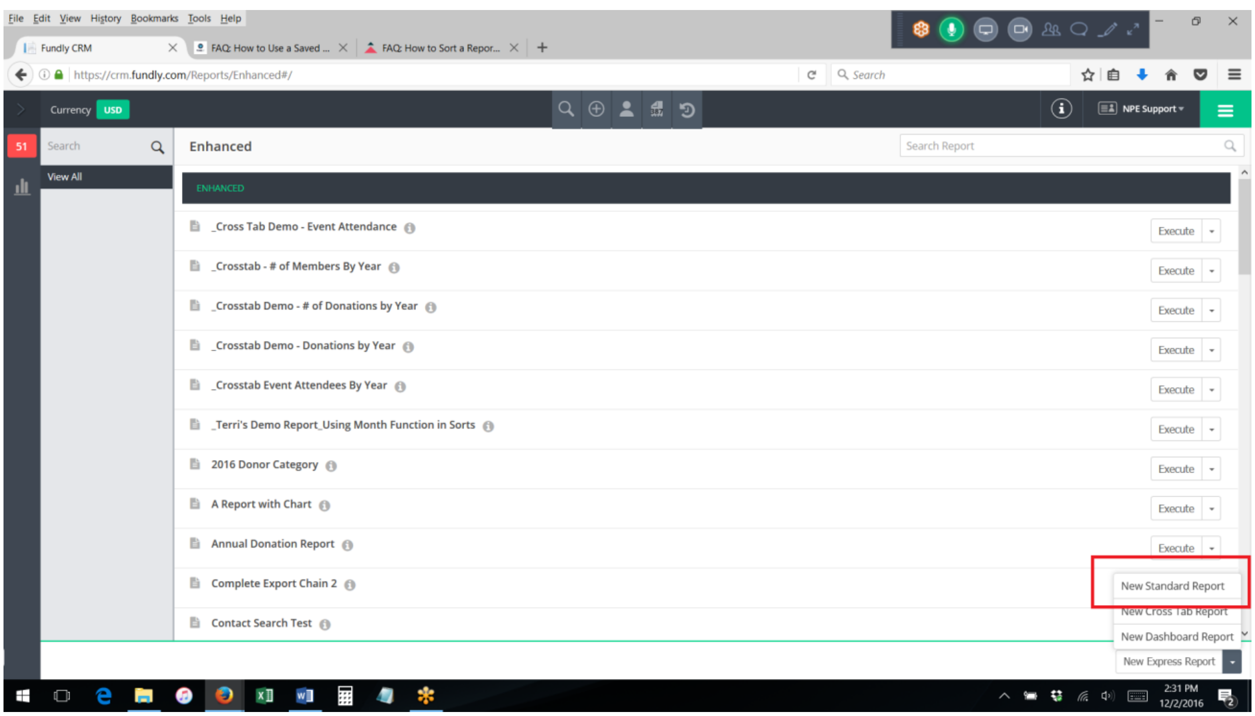
5. Give the search a name and click “search” to save the advanced search.



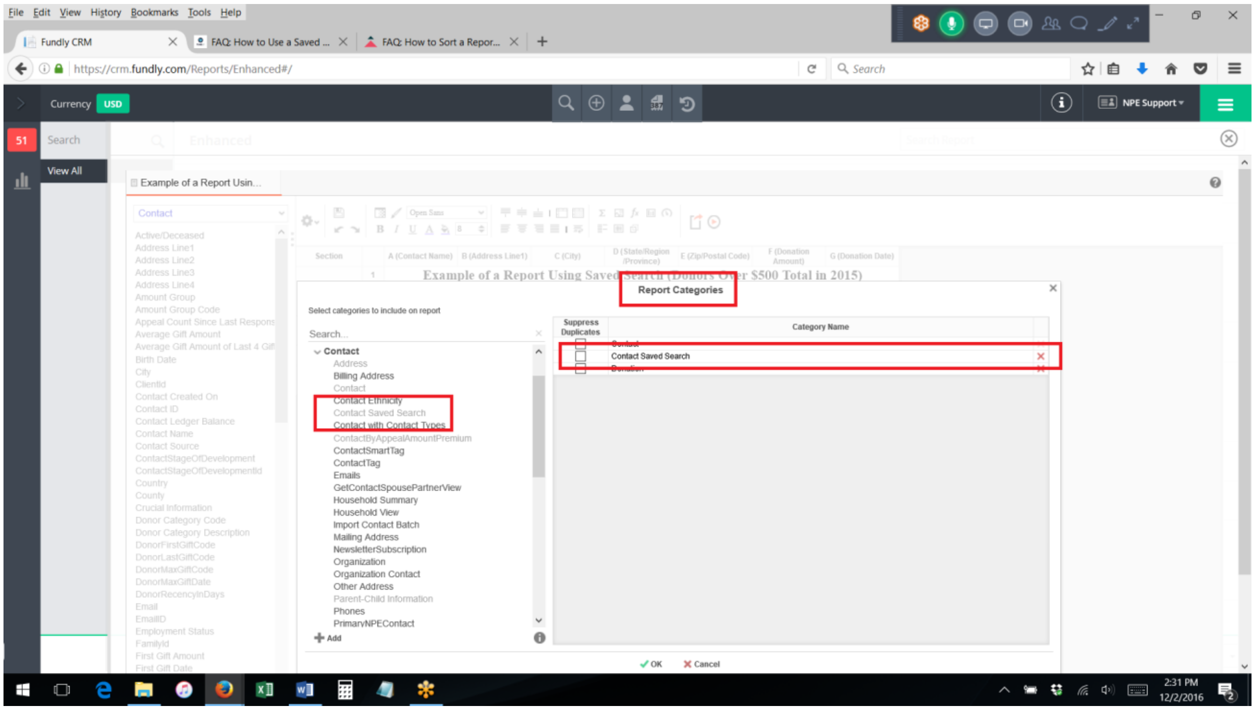
6. Go to Enhanced Reports



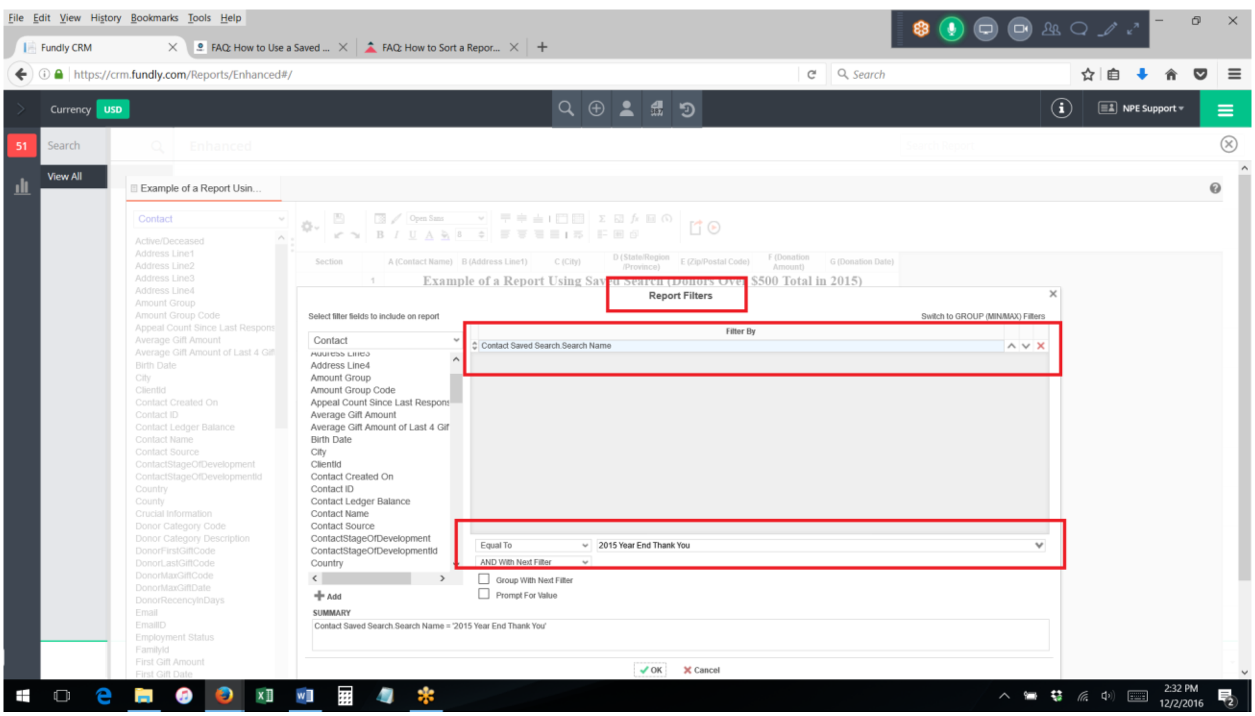
7. Create a new Express or Standard Report



8. On the Categories tab add the table "Contact Saved Search" (add any additional tables that you like)



9. On the Filters tab, add the field “Contact.Contact Saved Search. Search Name”



10. Change the criteria at the bottom of the screen to “equal to” and select the name of the saved search you want to use as a criteria.

11. Layout your report as normal and then run it. The report will use the saved searches criteria as filters in your report.
12. When using a saved search as the filter/criteria in a report, users should add any additional filters they want on the report **TO THE SAVED SEARCH** and **NOT as additional filters on the report.**