

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).

The screenshot displays the Fundly CRM Dashboard. At the top, there's a navigation bar with links for 'Dashboard Fundly CRM', 'FAQ: How to Use a Saved...', and 'FAQ: How to Sort a Repor...'. Below the navigation is a toolbar with icons for search, refresh, and other functions. The main area is titled 'Dashboard - As of 12/2/2016 12:00 AM Pacific' and features a search bar and an 'Advanced Search' button. A summary section shows key statistics:

Total Contacts	Total Active Contacts	Total Individual Contacts	Total Organization Contacts
622	608	531	77
Total Individual Donors	Total Organization Donors	Total Active Membership	Total Individual Members
0	0	58	60
Total Organization Members	Contact Limit		
7	50,001		

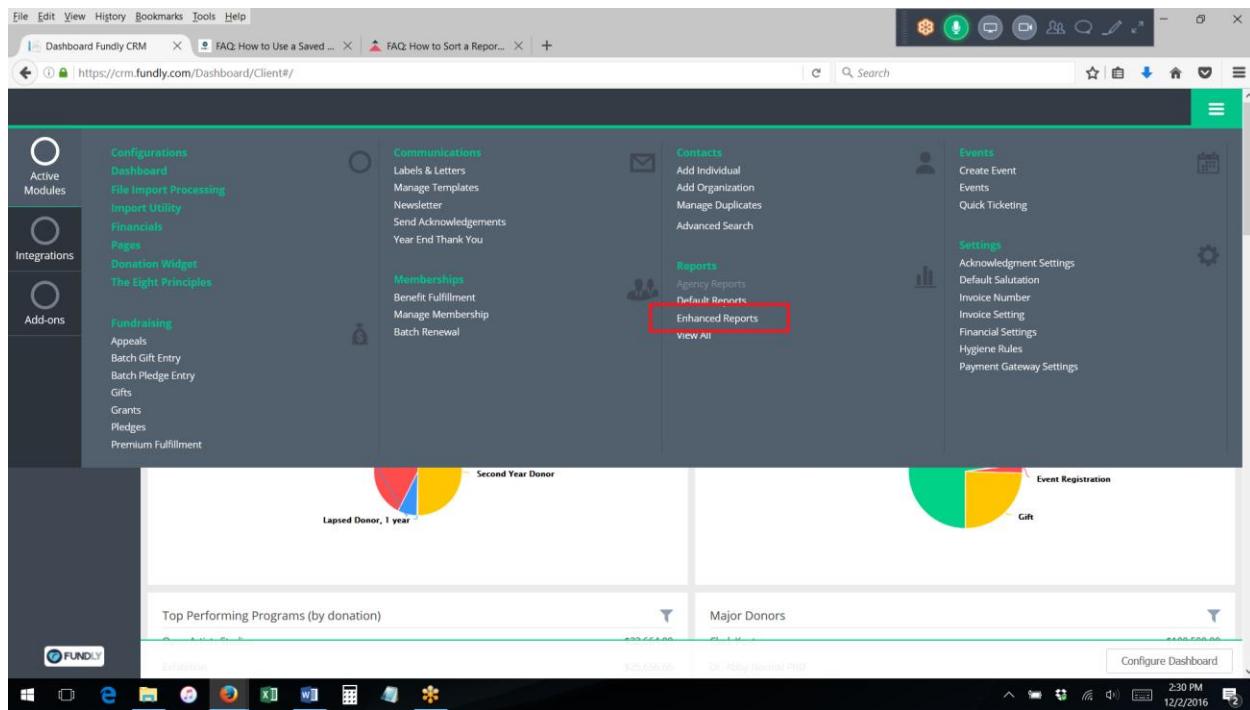
Below this are two charts: 'Donor Category Chart' (a pie chart showing proportions of New Donor, Multi Year Donor, Second Year Donor, and Lapsed Donor, 1 year) and 'Source Of Income By Program' (a pie chart showing proportions of Grant, Membership, Event Registration, and Gift). Further down are sections for 'Top Performing Programs (by donation)', 'Major Donors', and a 'Configure Dashboard' button. The bottom of the screen shows the Windows taskbar with various application icons.

The screenshot shows the Fundly CRM search interface. On the left, there is a search criteria panel titled "Search" with sections for "Country" and "Other Criteria". The "Other Criteria" section contains two sets of rules: one for "Amount" set to "Greater Than 500.00" and another for "Gift Date" between "01/12/2015" and "12/31/2015". On the right, a grid of contact cards is displayed, each showing a thumbnail, name, ID, and last visited date.

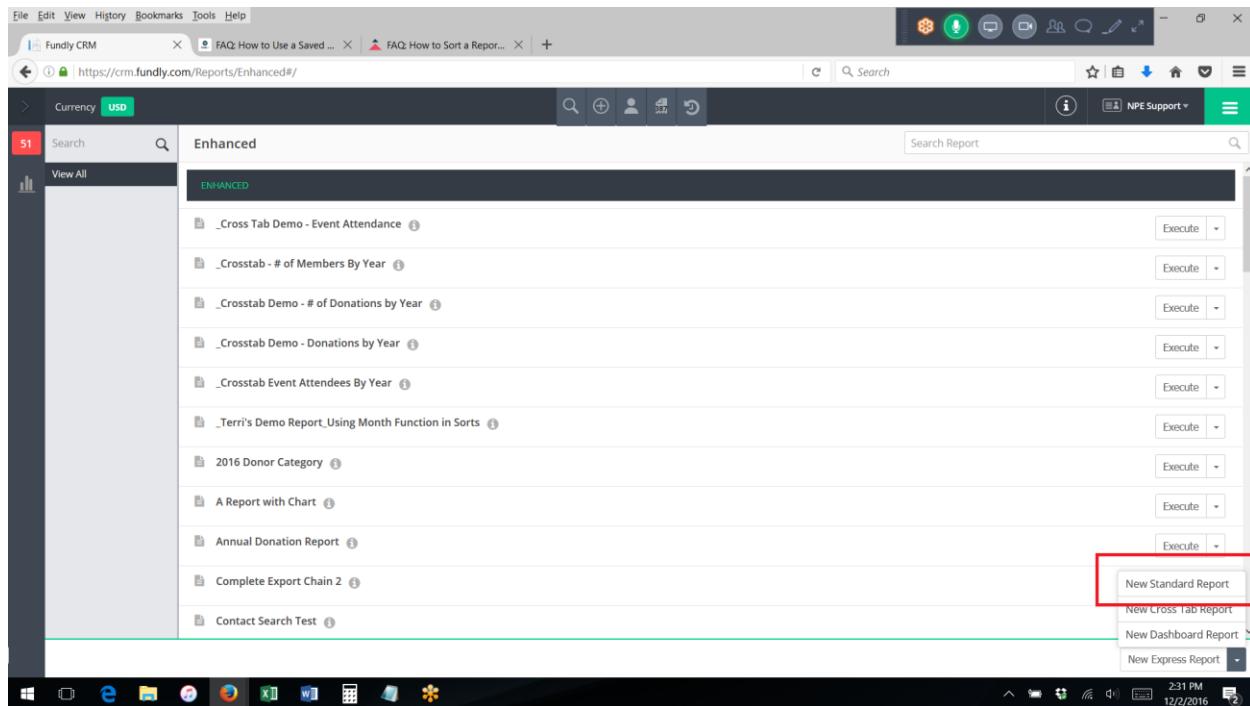
5. Give the search a name and click “search” to save the advanced search.

The screenshot shows the Fundly CRM search interface after saving a search. The search bar at the top now displays the name "2015 Year End Thank You". Below the search bar, there is a "Contact Information" section with fields for Contact ID, First Name, Last Name, Organization Name, Email, Phone, Address, and City. To the right, a "Recently Viewed Contact(s)" grid is shown, displaying 15 recent contacts with their names, IDs, and last visited dates.

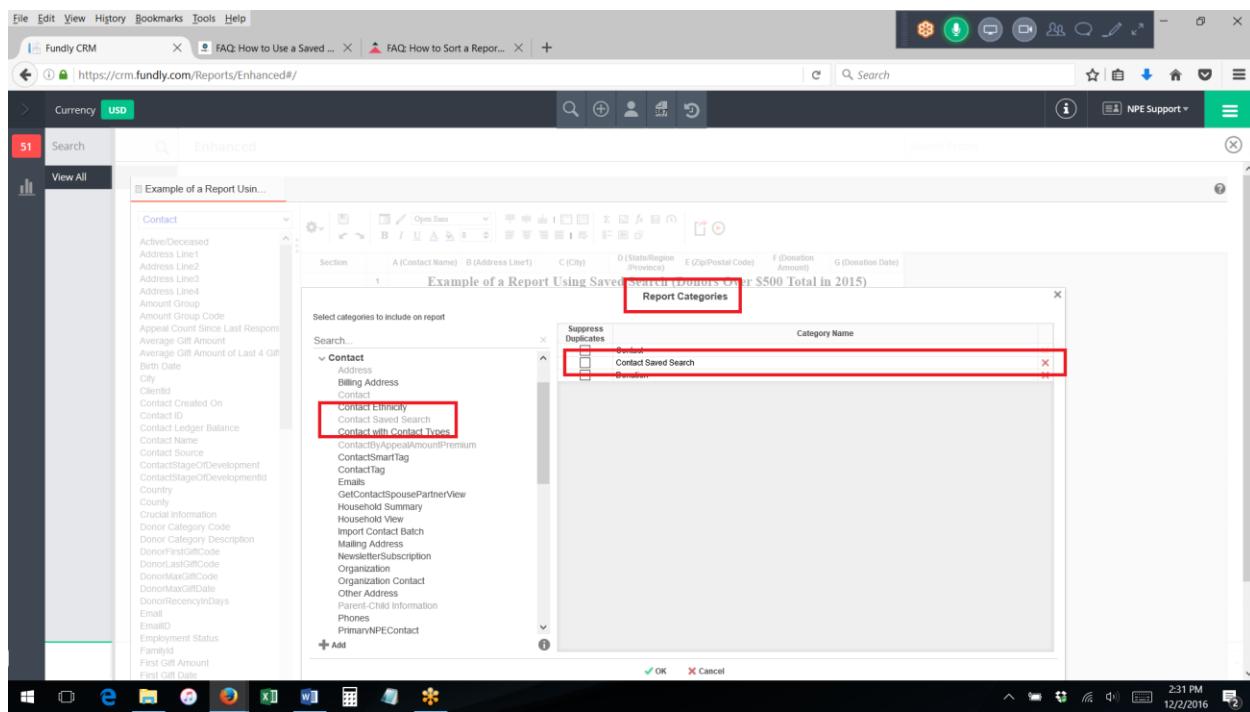
6. Go to Enhanced Reports



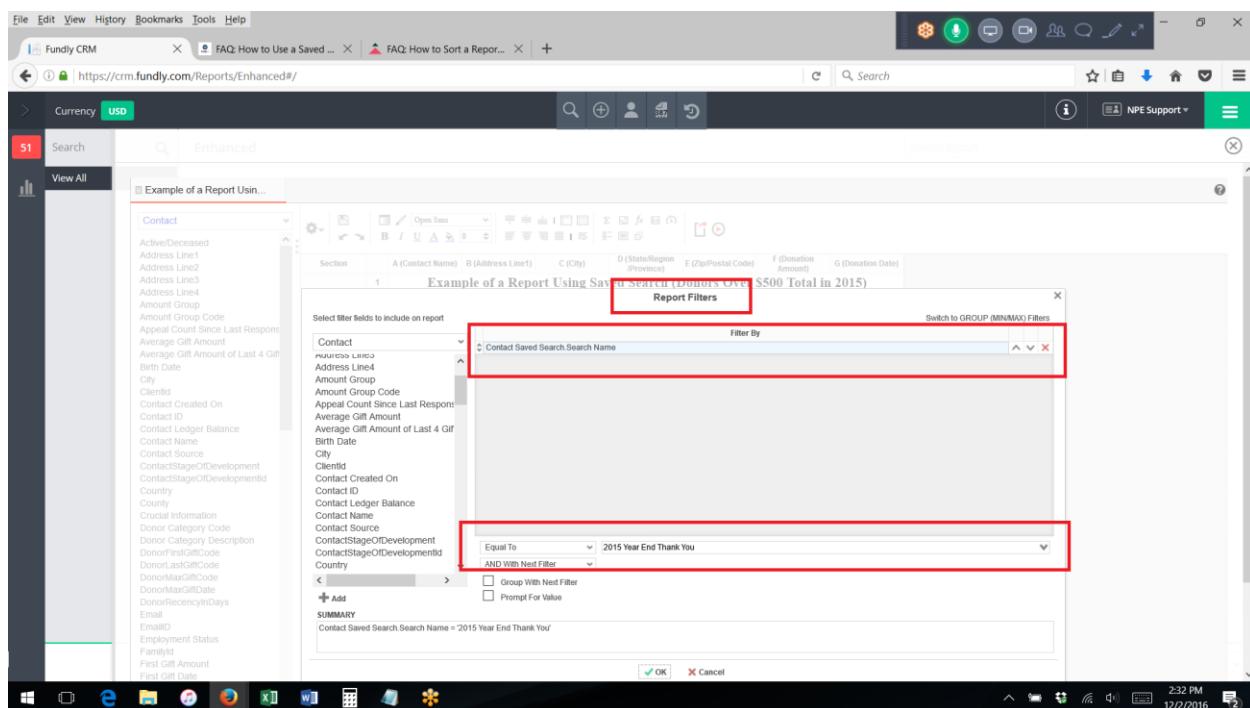
7. Create a new Express or Standard Report



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.**