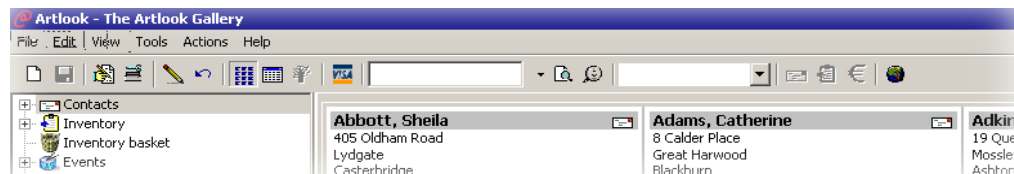


# The search options for finding and displaying Contacts

This Guide takes you through the various options available for locating individual Contact records and also for displaying a “view” of Contacts who meet a specific set of criteria.

The basic Contact search options can all be accessed through the menu bar at the top of the screen.



The basic search options are:

“Quick Search”



“Field Search”



“Advanced Search”



There is also an extended “**Find in comments**” search option which enables you to locate text in the comments field for a contact and which is located within the Edit menu option.

### 1. Quick Search



The Quick Search, as its name suggests is by far the most straightforward searching mechanism. Text entered to this box will automatically search either on the Surname or File As fields. Select which field you wish to search on by clicking on the drop down arrow to the right of the box and making your selection. The default for searches is Surname. Remember that the File As entry for a Contact record is the name you see displayed at the head of the record. You may sometimes have given a contact record a File As description which is not based on their surname. This often happens in the case of organisations where you will have filed all contacts for a particular company under the company name as opposed to the contact surname.

Start typing in the box, after a few seconds Artlook will automatically search on what you entered. You do not need to hit Enter/Return after typing, nor do you need to type the complete entry. For instance, just entering “smi” will cause Artlook to find the first record

where the surname or file as begins “smi”. The more you type the more accurate your search will be.

Once Artlook has made the search the Quick Search box is automatically cleared and you will be located on the record which was found (or where you were originally if the search found nothing matching). To repeat the search click in the box again and type your search again – using more of the name if the first search failed.

The text you type in the Quick Search box is entirely **non**-case sensitive. It is irrelevant whether or not you use all capitals, all lower, initial capital etc.

## **2. Field Search**



If the Quick Search fails to find the desired Contact you can use Filed Search to search using fields other than Surname or File As. In fact you can search on any Contact record field using this option.

Clicking on the Field Search button (or hilling Ctrl-F) brings up the following box:

A screenshot of a Windows-style dialog box titled "Find customer ...". It contains a "Field Value" text input field, a "Search Type" section with a "Case-sensitive" checkbox and three radio buttons for "Exact Match", "Partial Match at Beginning" (which is selected), and "Partial Match Anywhere". Below is a "Fields" section with a dropdown menu currently showing "File as". At the bottom are three buttons: "First", "Next", and "Cancel" (with a red X icon).

(Note that if you have previously searched for a Contact using the Quick Search option the name you entered then will appear in the Field Value box here).

Start your search by making a selection from the Fields box. Click on the drop down arrow to see all of the fields available to you. Scroll up and down the list to see all options. The fields are:

Address, City, Contact ID, Contact Type, Country, File As, First name, Full address, House, Main telephone number, Middle names, Organisation, Postcode, Preferred Contact method, Province, Street, Surname, Title

Select the field you wish to use.

Now enter the text for your search in the Field Value box. By default searches are not case-sensitive – you can change this by clicking on the Case-sensitive box but you will rarely need to do this.

Now decide how precise the search should be by choosing from one of the three Match options. The default is “Partial Match at the beginning”. Understanding these options is easier if we use an example.

If you are searching on the Surname field and have entered “smit” as the value to search for, setting the search match to be

“Exact match” – will find only those records where the surname is “Smit”

“Partial match at the beginning” - will find records where the surname is Smit, Smith, Smithers, Smithson etc.

“Partial Match Anywhere” – will find all of the above as well as “Arrowssmith”

“Blacksmithson” etc.

To perform your search hit the First button. The Field Search box disappears and you will be located on the first record which meets your search criteria. If this is not the record you are looking for you can either hit the F3 key to repeat your search or click on the Field Search icon again and choose Next (your previous search settings are always remembered).

Some tips for using Field Searches:

1. The Full Address field is recommended if you are searching a contact using an element of their address. Using this field will automatically also search on Street, Province, Country, Address (but not the Postcode field). If using this field you are always recommended to make your search “Partial Match Anywhere”
2. Field Searches are recommended if you know the contact’s Artlook reference number (use the Contact ID) field.
3. Always consider using the Field Search as opposed to the Quick Search where you are having trouble locating a contact – the ability to repeat your search just by hitting F3 will save a lot of time!


### **3. Advanced Search**



Both Quick Search and Field Search work on a single field only and return the search results one record at a time (ie you must repeat the search if the first search does not find the correct contact).

The Advanced Search lets you search on a combination of fields and also displays the results as a separate “View” (ie your contacts are filtered to display only those which meet the criteria).

Click on the Advanced Search icon and the following form appears:

Before using the Advanced Search always read the notes on the form to remind yourself how data should be entered – particularly the fact that any entries you make are case-sensitive. Please remember also that the results of your search are displayed as a new view or filter. You must hit the Refresh button on the menu bar to see all your contacts. 

You can enter information to a single field or any combination of fields. If you type “Smith” in the Surname field and hit Find, the contacts displayed are restricted only to those with an exact match of “Smith” for their surname. Hit the Refresh button to return to your normal contact view.

If you wanted to find everyone called Smith who lives in Manchester enter “Smith” and “Manchester” in the surname and city fields respectively.

The above examples will always work on exact matches, but you can also use the Advanced Search using “wild cards” (think of these as the “Partial match at the beginning” and “Partial match anywhere” options described under Field Searches). To find everyone whose surname is “Smith” and who lives in the “NW1” postcode area type Smith in the surname field and NW1\* in the postcode field. The \* (Shift-8) is the wild card symbol and in this case acts in the same way as “Partial match at the beginning”. This can be extended thus:

- NW1\* = all postcodes starting NW1
- \*4RG = all postcodes ending 4RG
- \*4R\* = all postcodes containing 4R anywhere within them

The same wild card principles can be used on any of the Advanced Search fields, either singly or as a combination of fields.

Some tips for using Advanced Searches:

1. Large databases on slower machines will very rarely appear to show inaccurate results for searches when the results are first displayed. If you have this problem switch to Grid View for your contacts using the icon on the menu bar before doing an Advanced Search then switch back to Memo View.



Grid view



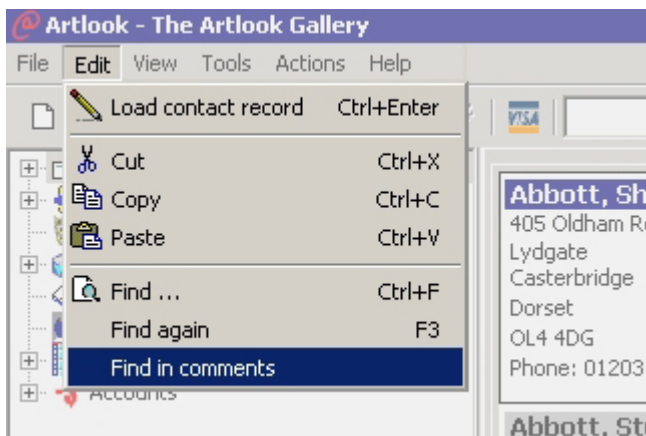
Memo view

2. Always remember that anything you enter is case sensitive!

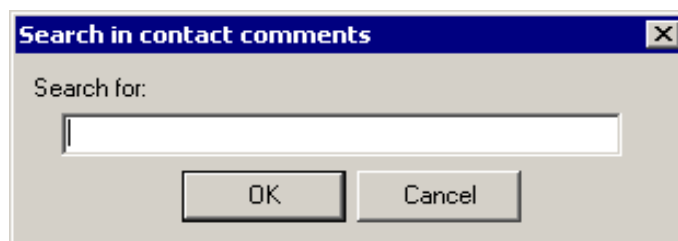
#### **4. Searching for text in the comments field**

Artlook enables you to search for any text which is contained within the Comments field of a Contact record. This can be particularly valuable when Artlook contains a contact database which has been converted from a previous system.

To use this function click on Edit on the main menu and choose “Find in comments”.



This will display the search box:



Enter the text you wish to search for bearing in mind the following:

- the search is not case sensitive (PLUMBER and plumber will be treated identically)
- all searches are “wild” – this means that the records found will contain any instance of your search term whether it is a whole word or any part of a word

The results which Artlook finds will be displayed as a new “view” or filter of your contact database in exactly the same way as described above under Advanced Search. Always remember to use the Refresh button to return to your full contact list.

A tip for using Comments field searches:

1. When you are creating a “minimal” Contact record that it is never going to form part of a mailing list (eg recording the phone number of your plumber) you can enter something in the comments field for that record to be used with this search option. These minimal records often have little consistency in terms of what has been entered for the surname, file as fields etc – putting a simple “keyword” in the comments field will help in pinning these contacts down subsequently.

## **5. Creating Contact Views**

For the ultimate flexibility in searching for Contacts you can create a Contact View – not only does this give you access to a vast range of search criteria it also represents a “search” which you can save.

Contact Views can naturally be created using fields other than those specifically relating to Contact address details and can be as simple or as complex as you wish. This is an example of something complex!

A view which contains:

*All contacts who live in Manchester or London or Glasgow and who have made a purchase from us in the last six months and who have a recorded interest in John Piper or William Kentridge and who have bought a Woodcut from us at any time and who are not on the VIP mailing list etc.*

Experimenting with Contact Views will quickly get you used to what can be achieved. To understand the basics, and using basic Contact searches as an example, the following will guide you through a search for Contacts who:

“Live in either SW1 or NW1 and were added to the mailing list in the past six months and who are not on our Private View list”.

Start by choosing View | Create View from the top menu. The following screen appears.

Now work through the following steps to create the view. If you suspect that you have no contacts with the postcodes SW1 or NW1 substitute these with postcodes which you know you

are likely to have. If you do not have a Category called “Private View List” substitute that for a category which you know you have and have attached to contact records previously.

1. Click on the drop down arrow in the Category box and choose **Contacts Address Details**. Click on the drop down arrow in the Item box and choose **Postal code**. Click on the drop down arrow in the Condition box and choose **like**. In the Value box type **SW1%**, ignoring the pop up list of postcodes which appears, and hit Enter/Return (The % symbol is used as a wild card symbol in the same way that \* is used for Advanced Searches. SW1% would find all postcodes beginning with, %SW1 would fine all postcodes ending with, %SW1% would find all postcodes containing)

2. With all four boxes completed hit the Add button. The screen will now look like this:

The screenshot shows the 'Contacts views' dialog box with the following configuration:

- Criteria tab selected.
- Instruction: ADD SELECTION CRITERIA AND THEN HIT RUN TO CREATE THE VIEW
- Category: Contacts - address detail
- Item: Postal code
- Condition: like
- Value: SW1%
- Condition type: And (selected)
- View name: none
- Date last modified: none
- Information: Run query when making [checked]
- Criteria list table:

Category	Data item	Condition	Operator
Contacts - address detail	Postal code	LIKE 'SW1%'	AND

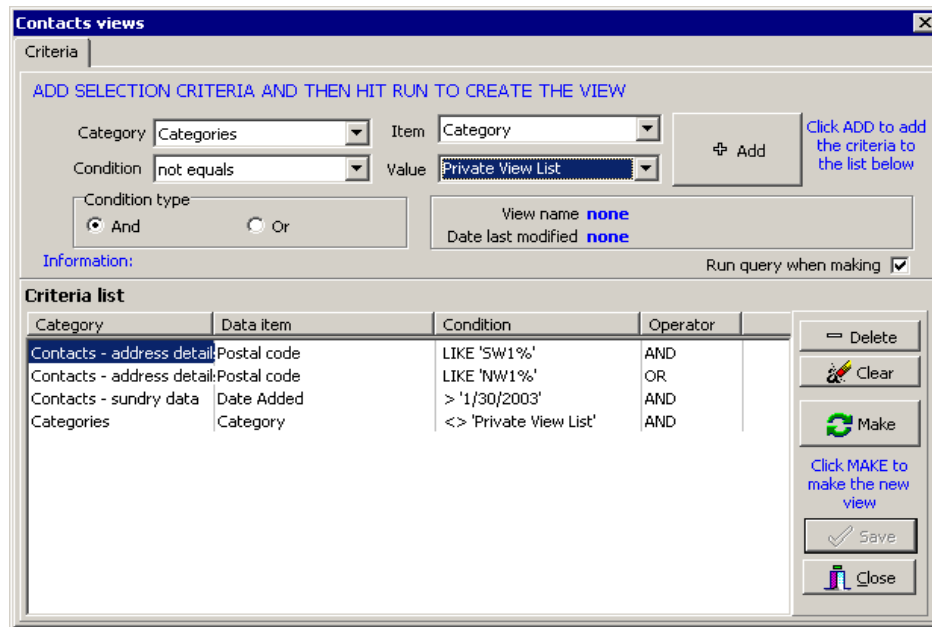
Buttons on the right: Delete, Clear, Make, Click MAKE to make the new view, Save, Close.

3. To enter the next line – the search for NW1 postcodes - click in the Value box and change the S to an N, again ignoring the pop up list which appears and hitting Enter/Return when done. Now find the **Condition Type** option and click on **Or**. Click on **Add**. You should now have two lines in the Criteria List.

4. Click on the drop down arrow in the Category box and choose **Contacts - sundry data**. Click on the drop down arrow in the Item box and choose **Date Added**. Click on the drop down arrow in the Condition box and choose **greater than**. In the Value box click on the drop down arrow – the list of dates you see are all the dates on which contacts have been added to the database. Scroll through to find a date which equates as closely as possible to six months ago and click on it. On the **Condition Type** option click on **And**. Click on Add and you should have three lines in the Criteria List.

5. The final step assumes here that “Private View List” is a Category on your system (you can use any category yo have for the purposes of this example). Click on the drop down arrow in the Category box and choose **Categories**. Click on the drop

down arrow in the Item box and choose **Category**. Click on the drop down arrow in the Condition box and choose **not equals** (Artlook will display a warning message regarding speed – simply click OK). In the Value box click on the drop down arrow. The list you see are all the Categories which have actually been applied to Contacts on your database (this may be different from the contents of the Master Item list for categories). Click on **Private View List** (or any other category) and then click on Add. Your screen should look like this:

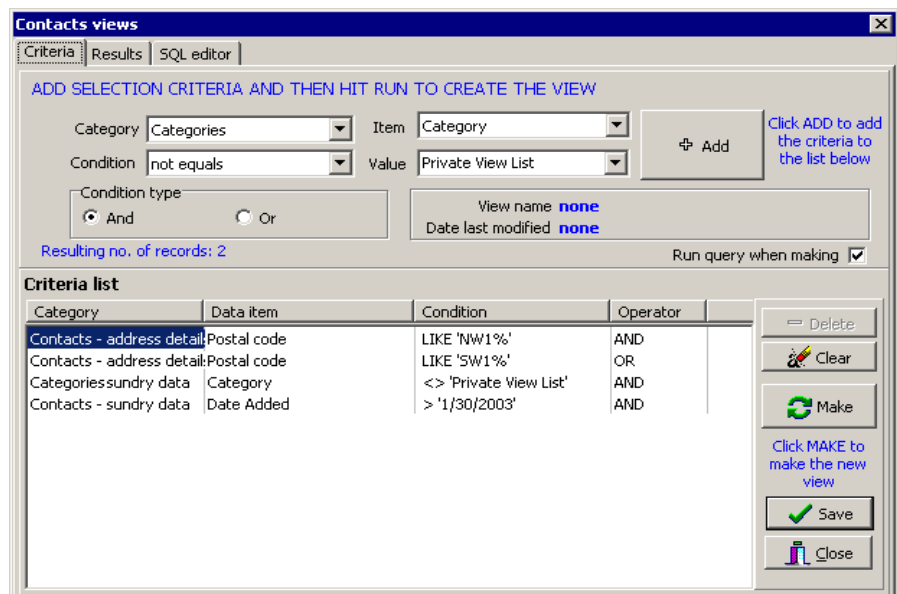


6. The basics for the view have now been added. These form the “question” which needs to be asked of the database and are collectively known as a “query”. To run the query click on the green **Make** button and your screen should look like this (your number of resulting records will inevitably be different)

You can review which records are included in this search by clicking on the **Results** tab.

To see the Contact records in detail click on **Save** and enter a name. Now click on **Close**.

Click on the plus sign to the



left of Contacts in the left hand shortcut panel and you will see a list of your saved Views. Click once on a view to display the relevant Contacts, double click a View to see the query on which that View is based. To delete a View right click on the View in the shortcut panel and choose Delete. This does not delete the contacts in question just the query on which the view itself was based.

Remember that a View is “dynamic” – each time you click on a View the query is run against the contact database. It is not a static list of contacts and will therefore change as your contact database changes. The number of records in a specific view is displayed at the bottom of the main Contacts window.

Using Views requires some practice but it will be time well spent in the future. Views will let you pin point groups of contacts for marketing and analysis purposes and will give you a very detailed overview of customer activities.