# Simple Contact Searches

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# **Simple Contact Searches**

## A basic contact search

Note: You must be logged into the Contact Management System via <u>https://cms.cofeportal.org/</u> See the "Getting Started" guide.

Go to the Contact Search tab

	Dashboard	Q CONTACT SEARCH
۰	Announcements	
*	Contact search	CONTACT SEARCH
۵	Post search	STANDARD SEARCH FORM ADVANCED QUERY BUILDER
Ŷ	Place search	Use this page to find contacts within the CMS. To constrain your search at and below a pa
۲	National directory	Advanced options allow searches by postcode and for past and future-dated posts.
۹,	Request CMS access	Search criteria
B	My saved searches	Contact
	Diocesan saved searches	Search name fields only?
	Reports	Show advanced search options [+]
¥	Activities 1	Q Search 2 Reset
?	Help	

In the Standard Search Form (tab): Search Criteria you can search by **Contact** (broadly or just within the name field); by **Place** (or places) or by **Role** (or roles), or a combination of all three.

TIP: Using the "AND" operator will help you find more relevant results.

"Smith" returns 124 contacts
"John Smith" returns 679 contacts
"John AND Smith" returns 10 contacts
"John AND Smith" (name fields only) returns 7 contacts

For each contact you can click the Open contact button to view more details.

### Search result options

#### Saving the search

When you have completed a search you may want to save the search criteria for using again.

To do this click the **Save** button.



You can then give the search a name and then you will be able to reload to search from the My Saved Searches menu.

My saved searches

#### **Print labels**

Click the print button and choose the label size you require.



#### PRINT LABELS

Please select from the following labels (opens in new tab)
ALL CONTACTS

Avery L7160 - 3 columns (21 entries per page)
Avery L7162 - 2 columns (16 entries per page)
Avery L7163 - 2 columns (14 entries per page)
Avery L7160 - 3 columns (21 entries per page)
Avery L7162 - 2 columns (16 entries per page)
Avery L7163 - 2 columns (14 entries per page)
Avery L7160 - 3 columns (21 entries per page)
Avery L7162 - 2 columns (16 entries per page)
Avery L7163 - 2 columns (14 entries per page)

#### Download the results to Excel



#### **Email the contacts**

Only available if you have the emailer permission.