

Complex Find

There will be times when more than one field will need to be searched to find a particular set of members or prospects. In order to find these records, understanding the search features in CPMS is important.

This chapter will review how to find several records that match more than one criterion at a time.



Objectives

At the completion of this section, you will be able to:

- Find records based on more than one set of criterion.

Complex Find

For this example, 301 Ministry teachers / leaders want a list of all the people who have completed Class 101 – Membership AND Class 201 – Maturity, but who have not completed Class 301 – Ministry OR Class 401 – Missions.

Before trying to find these records, go to the Discipleship section under Life Development and enter a date in the Class Date field (probably the date they started the class), and select the YES radio button under Committed once the class is successfully completed.

After entering the information in the appropriate records, do the following:

1. Click on **Membership**.
2. Click on the **Discipleship** radio button.
3. The following window will appear:

CPMS 4.0 Platinum Edition

Membership Letters... Classes Music Pastor PrayTimer Management

Pre First MI Last Suf
Mr. Clair Alleman

Life Development

Level	Goal	Class Date	Committed	Team Role
101	Membership		<input type="radio"/> Yes <input checked="" type="radio"/> No	
201	Maturity		<input type="radio"/> Yes <input checked="" type="radio"/> No	
301	Ministry		<input type="radio"/> Yes <input checked="" type="radio"/> No (See Below)	
401	Missions		<input type="radio"/> Yes <input checked="" type="radio"/> No	

301 Ministry Team Roles

One to One	Children's Ministry	Men's / Women's Ministry
<input type="checkbox"/>	<input type="checkbox"/> Camps	<input type="checkbox"/> Apprentice <input type="checkbox"/> SPECIAL EVENTS
<input type="checkbox"/> Youth Ministry	<input type="checkbox"/> Children's Min.	<input type="checkbox"/> Christams Tea <input type="checkbox"/> Women's AM
<input type="checkbox"/>	<input type="checkbox"/> ELEMENTARY	<input type="checkbox"/> Easter <input type="checkbox"/> Women's PM
<input type="checkbox"/>	<input type="checkbox"/> Leader	<input type="checkbox"/> Host <input type="checkbox"/> Women's Retreat
<input type="checkbox"/>	<input type="checkbox"/> Other	<input type="checkbox"/> LEADER ROLE
<input type="checkbox"/> Bible Study	<input type="checkbox"/> PRESCHOOL	<input type="checkbox"/> Men's Monthly
<input type="checkbox"/>	<input type="checkbox"/> Qtly Events	<input type="checkbox"/> Men's Weekly
<input type="checkbox"/> Pastor / Leader Mtg	<input type="checkbox"/> SPECIAL EVENTS	<input type="checkbox"/> Mother's Day
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/> Sunday School (E1-E6)	<input type="checkbox"/> Refreshments
	<input type="checkbox"/> Sunday School (P1-P5)	<input type="checkbox"/> Seminar
	<input type="checkbox"/> VBS	<input type="checkbox"/> Single's

Management Team Role
Bldng Team

Magnification Team Roles
Creative: Ushers
Worship:
Setup: Usher

Record 1 (767 of 767)

View List
Search
Print
Add New
Delete

Basic Info
Follow Up
Membership
Discipleship
Shape
Prayer Request
Classes
Giving
Correspondence
Contact Notes

100 Browse

4. Click **Search** on the toolbar.

Complex Find (Continued)

5. The screen will now show a 'blank' record with a **Find** button on the left hand side of the window as shown below:

The screenshot shows the 'Membership.cpm' application window. On the left sidebar, there is a 'Find' button. The main area displays a table under the 'Life Development' section:

Level	Goal	Class Date	Committed	Team Role
101	Membership		<input type="radio"/> Yes <input type="radio"/> No	
201	Maturity		<input type="radio"/> Yes <input type="radio"/> No	
301	Ministry		<input type="radio"/> Yes <input type="radio"/> No	(See Below)
401	Missions		<input type="radio"/> Yes <input type="radio"/> No	

Below the table are sections for '301 Ministry Team Roles' and 'Men's / Women's Ministry' with various checkboxes for different activities and roles.

6. Select **YES** under Committed to the right of **101 MEMBERSHIP** and the **YES** under Committed to the right of **201 MATURITY**.
7. Select **Request / Add New Request** from the Menu bar.
8. A New 'blank' screen will appear.
9. Select **YES** under Committed to the right of **301 MINISTRY**.
10. ALSO check the **Omit** box on the left-hand side of the window.
11. Select **Request / Add New Request** from the Menu bar.
12. Another New 'blank' screen will appear.

Complex Find (Continued)

13. Select **YES** under Committed to the right of **401 MISSIONS**.
14. ALSO check the **Omit** box on the left-hand side of the window.
15. Finally, click **FIND** on the left-hand side of the window.
16. The screen will reflect the first record found and also show the total number of records that matched the criteria in the gray bar on the left.
17. These people (the 'Found Set') are now the only records available.
18. Click **Print**.
19. From the Print menu, print a directory or labels for this group of people.
20. To make all records available again, click the **Search** button twice.

➤ **NOTE**

*The above SEARCH would be: Find **All** Records where YES is checked for Class 101 **AND** all records where YES is checked for Class 201 **OR** all records where YES is **NOT** checked for Class 301 **OR** all records where YES is **NOT** checked for Class 401. By selecting Request / Add New Request, it means **OR** and when the **OMIT** box is checked, it means **NOT**.*

Complex Find – Example Two

This time the 301 Ministry teachers / leaders need a list of all the people who have started Class 101 – Membership AND Class 201 – Maturity, but who have not started Class 301 – Ministry.

Before trying to find these records, go to the Discipleship section under Life Development and enter a date in the Class Date field (probably the date they started the class), and select the YES radio button under Committed once the class is successfully completed.

After entering the information in the appropriate records, do the following:

1. Click on the **Membership** tab.
2. Click on the **Discipleship** radio button.
3. The following window will appear:

CPMS 4.0 Platinum Edition

Membership Letters... Classes Music Pastor PrayTimer Management

Pre First MI Last Suf
Mr. Clair Alleman

Life Development

Level	Goal	Class Date	Committed	Team Role
101	Membership		<input type="radio"/> Yes <input checked="" type="radio"/> No	
201	Maturity		<input type="radio"/> Yes <input checked="" type="radio"/> No	
301	Ministry		<input type="radio"/> Yes <input checked="" type="radio"/> No (See Below)	
401	Missions		<input type="radio"/> Yes <input checked="" type="radio"/> No	

Management Team Role
Bldg Team

Magnification Team Roles
Creative: Ushers
Worship:
Setup: Usher

301 Ministry Team Roles

One to One	Children's Ministry	Men's / Women's Ministry
<input type="checkbox"/> Camps	<input type="checkbox"/> Children's Min.	<input type="checkbox"/> Apprentice
<input type="checkbox"/> Youth Ministry	<input type="checkbox"/> ELEMENTARY	<input type="checkbox"/> Christams Tea
<input type="checkbox"/> Bible Study	<input type="checkbox"/> Leader	<input type="checkbox"/> Easter
<input type="checkbox"/> Pastor / Leader Mtg	<input type="checkbox"/> Other	<input type="checkbox"/> Host
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/> PRESCHOOL	<input type="checkbox"/> LEADER ROLE
	<input type="checkbox"/> Qtty Events	<input type="checkbox"/> Men's Monthly
	<input type="checkbox"/> SPECIAL EVENTS	<input type="checkbox"/> Men's Weekly
	<input type="checkbox"/> Sunday School (E1-E6)	<input type="checkbox"/> Mother's Day
	<input type="checkbox"/> Sunday School(P1-P5)	<input type="checkbox"/> Refreshments
	<input type="checkbox"/> VBS	<input type="checkbox"/> Seminar
		<input type="checkbox"/> Single's
		<input type="checkbox"/> SPECIAL EVENTS
		<input type="checkbox"/> Women's AM
		<input type="checkbox"/> Women's PM
		<input type="checkbox"/> Women's Retreat

Record 1 (787 of 787)

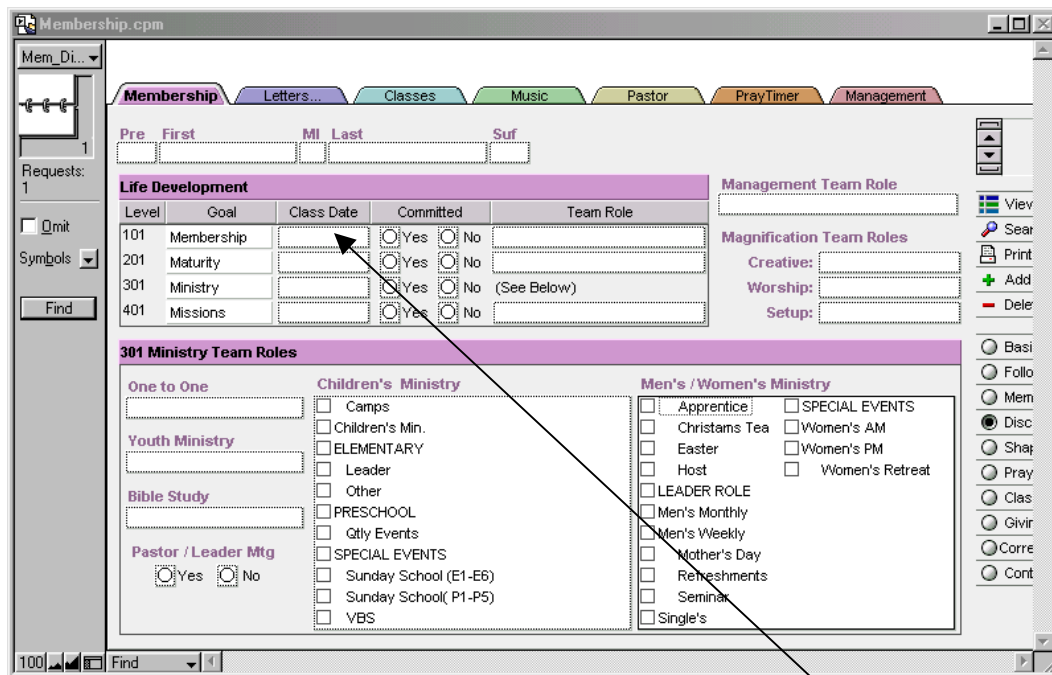
View List
Search
Print
Add New
Delete

Basic Info
Follow Up
Membership
 Discipleship
Shape
Prayer Request
Classes
Giving
Correspondence
Contact Notes

4. Click the **Search** button.

Complex Find – Example Two (continued)

- The screen will now show a 'blank' record with a **Find** button on the left-hand side of the window as shown below:



- Type a date range in the box to the right of **101 MEMBERSHIP** and in the box to the right of **201 MATURITY**. For example, to see all people who have taken both classes in the first quarter of 2000 or before. Type the date as follows:
 $\leq 3/31/2000$
- Put an = in the date box to the right of **301 MINISTRY**. Therefore, if a date has been entered for this class, those records will not be included.
- Finally, click **FIND** on the left-hand side of the window.

Complex Find – Example Two (Continued)

9. The screen will reflect the first record found and also show the total number of records that matched the criteria in the gray bar on the left.
10. These people (the 'Found Set') are now the only records available.
11. Click **Print**.
12. From the Print menu, print a directory or labels for this group of people.
13. To make all records available again, click the **Search** button twice.

➤ **NOTE**

*The above SEARCH would be: Find **All** Records where the date for Class 101 falls within the date range **AND** all records where the date for Class 201 falls within the date range **AND** all records where no date has been entered for Class 301.*