

# Searching and Filtering

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EventsAir gives you the power to efficiently search your records and apply various filters, so you can find individuals or groups based on almost any criteria:

- **Attendee Searches** – find individual Attendee records, or see groups such as all Exhibitors, or all Attendees who owe a balance on their account. You can also filter by your own custom tags.
- **Report Searches** – filter the specific information you want to view in a report. For example, you can run a Note Type report, and filter it specifically to show attendees with Dietary Requests.
- **Communication Searches** – filter for specific Attendees so you can send relevant communications (e.g. send a Payment Reminder Merge Doc ONLY to Attendees who have a balance due).
- **Project and Run Sheet Searches** – search for items in the Project or Run Sheet, such as Location, Team Member, Dates, Times and Priority.
- **Mobile App Filters** – restrict display of Attendees, Sponsors, and Exhibitors to specific groups. For example, you may wish to exclude student registrations from the Attendee Search in the Mobile App.
- **Express Action Searches** – used in many tools, such as Imports, Exports, Duplicate Finder, Bulk Actions, Function Table Allocation, Meeting Matching, Re-Issue Invoices, and CE Course Management.
- **Custom Document Searches** – filter based on whether or not a specific document has been uploaded.
- **Photo Status Searches** – search records based on Photo Status, such as Accepted, Requested, Not Uploaded, Not Reviewed, Replacement Requested, or Not Required.

## Filtered Search

Using filtered searches is especially useful when you combine filters. You may wish to see a list of attendees from New York, or a list of attendees who are registered as speakers, or a niche group who are in both categories. With Filtered Search, you can enter full or partial search criteria in any module of the EventsAir Attendee Record.

There are many ways to use a Filtered Search. Some examples include:

- Search for all attendees who registered with **Early Registration**
- Search for all attendees who live in a particular state or country
- Search for all attendees who have a special **dietary request**
- Search for all speakers who have **NOT submitted their final papers**
- Search for all attendees who have **reserved a King Room** at a **specific hotel** on a **specific date**
- Search for any attendee who has selected a specific session shown on the **agenda**
- Search for attendees who **HAVE** or **HAVE NOT checked in to your event**
- Search for attendees who have a **balance due** on their account
- Search for members of a **specific attendee group**
- Search for attendees who have **not submitted a photo**
- Search for documents in **custom fields** based on being **received** or not **received**
- Search for contacts who have **printed their name badge onsite**
- Search for contacts containing a specific portion of an **email address**
- Search for submitting authors that have **review conflicts**
- Search for reviewers with **affiliate conflicts**
- Search for records that have **specific fields left blank**

## Selected Records Tab

In many parts of EventsAir, such as Reporting and Communications, performing a filtered search will open up a Selected Records Tab. This tab will display a list of all returned records resulting from the filtered search.

SELECT REPORT			
Reports		Selected Records	
<input checked="" type="checkbox"/>	ID	NAME ↓	ORGANIZATION
<input checked="" type="checkbox"/>	57	<a href="#">Young, Mr. Cliff</a>	Ultralearning School District
<input checked="" type="checkbox"/>	56	<a href="#">Yamamoto, Mrs. Alicia</a>	Maximum Success School District
<input checked="" type="checkbox"/>	52	<a href="#">Wood, Mr. Timothy</a>	Paleo School District
<input checked="" type="checkbox"/>	55	<a href="#">Williams, Mr. Richard</a>	Pro Kid Day District
<input checked="" type="checkbox"/>	58	<a href="#">Waller, Mrs. Amy</a>	Prototype School District
<input checked="" type="checkbox"/>	64	<a href="#">Tyler, Mrs. Irma</a>	Geoteam School District
<input checked="" type="checkbox"/>	63	<a href="#">Turner, Mr. Robert</a>	Electrolearn School District
<input checked="" type="checkbox"/>	66	<a href="#">Thorne, Ms. Kimberly</a>	Sunnybank School District
<input checked="" type="checkbox"/>	60	<a href="#">Swartz, Ms. Kathleen</a>	Cantebury School District
<input checked="" type="checkbox"/>	54	<a href="#">Strader, Ms. Sonia</a>	Manu School District

You can de-select any records you don't want to include in the search results (for example, if you don't want to send a communication to them) and you can click on any name to jump to that contact record.

## Saving Searches [Filters]

In addition to creating powerful searches, you can save searches and re-use them at a later time. Creating a Saved Search is easy to do:

1. Created your filtered search
2. Select the Save Button
3. Give your Filter Set a name
4. Select Save

## Loading a Saved Search [Filter]

Choose Load, and select the saved Filter Set you want to apply.

**Tip:** Saving a search here saves the *search filter criteria*, not the *search results*. When you Load and re-run a Saved Search, it will re-run against your *current* data, and so will **also** show you any people (matching those criteria) that have since been added to the database.

For example, if you create a Saved Search to find Accompanying Person registrations, and then Load and re-run that same Saved Search next week, it will also show all matching registrations that have been entered in the meantime.

**Note:** This is different from **Data Snapshots** (and also the **Save as Filter** button, found in some utilities like **Waitlist Management**), which will save the *search result* (the list of Attendees) that matched the query criteria *at the time the query was first run*. You can review these results at any time, and they will not change. This can be useful to track specific actions for particular people – in this case, to see which Attendees have been processed by the Waitlist Management screen.

# Data Snapshots

A **Data Snapshot** allows you to capture, or remember, the results of a given search, and later re-use those results.

For example, you could search and create a Data Snapshot of everyone who's signed up for the opening gala event. The Data Snapshot remembers the results of that search. In this example, you may have 550 attendees who showed up in that first search. Later, you run a report to see who's attending the closing night awards ceremony, but you really want to know who is attending both events. You could search for attendees of the closing night awards ceremony, and apply your data snapshot for attendees of the opening night gala. This allows you to see a report of attendees who have signed up for both events.

[Click here](#) for more information on using Data Snapshots.

# Data Validation

**Data Validation** helps you find specific data, with the help of pre-defined data rules covering a variety of common searching/filter situations. You can also ask for other validation rules to be set up by the EventsAir team. You can also assign your own filters. For example, you could filter **ONLY** for Speaker Registration Types, and then apply the Data Validation rule of Contacts with no Presentations.

Data Validation options include:

- **Contacts with Email Address** – only returns contact records that contain an email address
- **Contacts with no Accommodation** – only returns contact records without an accommodation entry
- **Contacts with no Agenda** – only returns contact records that have no agenda selections
- **Contacts with no Exhibition** – only returns contact records that have no exhibition selections
- **Contacts with no Functions** – only returns contact records that have no function selections
- **Contacts with no Photo** – only returns contact records that have no uploaded photos of the attendee
- **Contacts with no Presentations** – only returns contact records that have no presentation entries
- **Contacts with no Registrations** – only returns contact records that have no registration selections
- **Contacts with no Sponsorship** – only returns contact records that have no sponsorship selections
- **Contacts with no Travel** – only returns contact records that have no travel selections
- **Exhibitors without Stand Numbers** –
- **Presentations with Review Conflicts** –
- **Presenters with No Registration** – only returns contacts with presentations entered who do not have a registration type selected
- **Presenters with Overlapping Sessions** – only returns contacts who have multiple presentations with overlapping session dates and times
- **Travel Arrival and Accommodation Check-In Not on the Same Day** – only returns contacts whose travel and accommodation arrival dates do not match
- **Travel Departure and Accommodation Check-Out Not on the Same Day** – only returns contacts whose travel and accommodation departure dates do not match.

# Pinning Records and Pinned Record Sharing

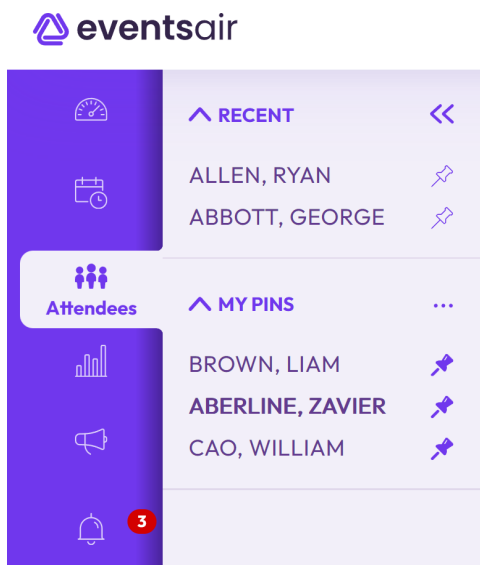
Within a list of attendees, you can click on one of the names to view and edit their details. Sometimes, you may want to keep that attendee's record handy so you can jump back into it at a later time. This is a very common situation for meeting planners.

- You may need to call a hotel about the attendee.
- You may need to research a payment from an attendee.
- You may need to chat with an associate (who may be out of the office at the moment) about an attendee.

If you want to set an attendee's record aside, but have it handy to jump back into without going through another search, click on the Pin icon



to the right of the Attendee name. Your "Pinned" record now appears in the Pinned list on the left side of your Attendee Panel. When you come back later, the record is quickly available. You can pin multiple records.



## Pinned Record Sharing

EventsAir allows you to see and interact with the Pinned Record list from any other user on your team. [Click here](#) to learn more about Pinned Record Sharing.

## Searching for Pinned Records

Throughout EventsAir, when using the search and filtering process, you can search for any other user's pinned records as well.

## Searching for people in the linked Contact Store

If your event is linked to a Contact Store, you can easily find people in the Contact Store and add them to your local event.

Select which event you are searching (the Contact Store, or the local event) from the drop-down list in the bottom left of this screen. (Only visible if you have linked this event to a Contact Store in [Event Setup](#).)

For more information on this powerful feature, see our Help article on the [EventsAir Contact Store](#).

## Searching for Contacts by Events Attended

You can now find contacts in the Contact Store by filtering on events they have attended.

Look for the Events Attended section of the filter, and enter details of the event or events you wish to search.

**Note:** This feature is only available in Contact Stores (also including CE Contact Stores, and Membership Contact Stores).