
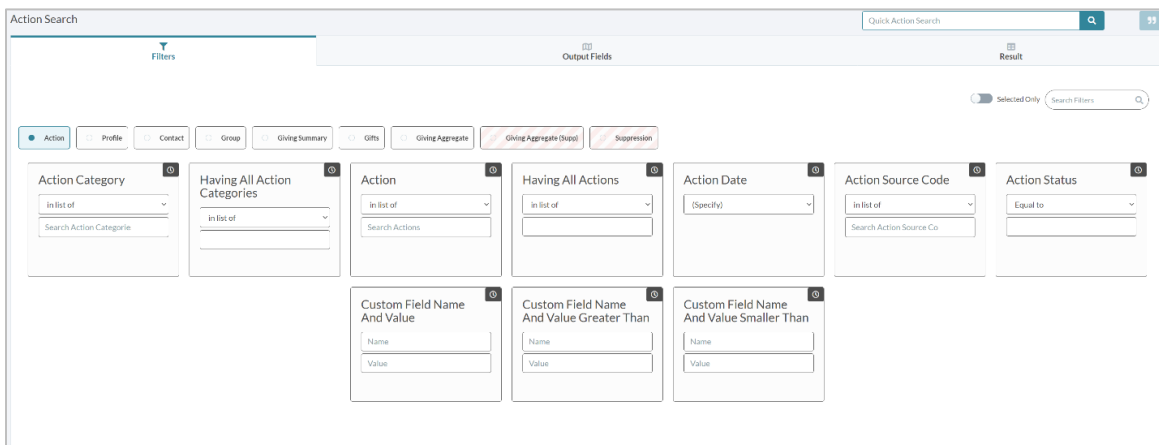


Running a search for Actions is similar to all other searches found throughout Julep, with filters designed specifically for Actions. This tool will allow you to search for Actions assigned to People Records.

- To find the Action Search, go to the People Dashboard and click on the  icon in the Navigation Bar.
- The search will provide transactional results, meaning a People Record may appear multiple times if they have multiple actions that match the filters.



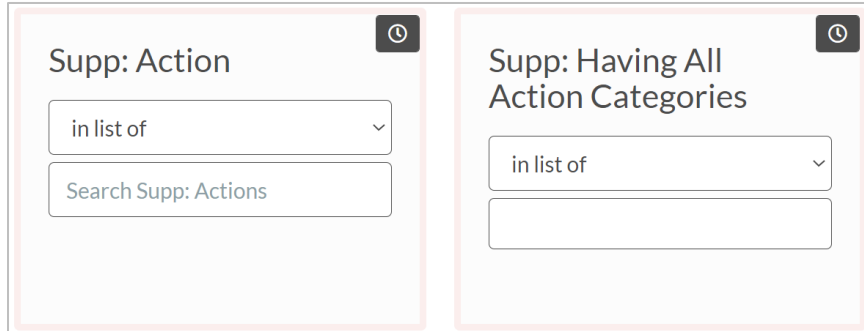
The screenshot shows the 'Action Search' interface. At the top, there are tabs for 'Filters', 'Output Fields', and 'Result'. Below these, there are several filter categories: Action, Profile, Contact, Group, Giving Summary, Gifts, Giving Aggregate, Giving Aggregate (Supp), and Suppression. The 'Action' category is selected. Below the categories, there are several filter boxes:

- Action Category:** In list of (dropdown), Search Action Category (text input)
- Having All Action Categories:** In list of (dropdown)
- Action:** In list of (dropdown), Search Actions (text input)
- Having All Actions:** In list of (dropdown)
- Action Date:** (Specify) (dropdown)
- Action Source Code:** In list of (dropdown), Search Action Source Co. (text input)
- Action Status:** Equal to (dropdown)
- Custom Field Name And Value:** Name (text input), Value (text input)
- Custom Field Name And Value Greater Than:** Name (text input), Value (text input)
- Custom Field Name And Value Smaller Than:** Name (text input), Value (text input)

 At the top right, there is a search bar labeled 'Quick Action Search' and a 'Selected Only' toggle with a 'Search Filters' button.

Action Filters

- Action Category – Search for actions within an Action Category.
- Action – Search specific action(s).
- Having All Action Categories and Having All Actions – Similar to the above, but you are searching for what matches ALL of the categories or actions that you list.
- Action Date – Date or date range of the action(s).
- Action Source Code – Action with a specific source code.
- Custom Field Name and Value – Search by the Custom Fields created for the action(s). First, add the Custom Field name in the first box, then the second in the Value for the field. These must be identical to what is in Action Settings.
- Custom Field Name and Value Greater Than and Custom Field Name and Value Smaller Than – Same as above but will search for actions that have field value that is greater or smaller than the value entered.
- There are also two Suppression filters
 - Action – suppresses any desired actions.
 - Having All Action Categories – suppresses People Records that have all actions listed.



When you run the Action Search, your results will populate with the actions that fit the selected filters. The results will display the **Action ID**, **Action Category**, **Action**, and the **Date** the Action was assigned. You will also see information of the People Record displayed.

ID	ActionCategory	Action	ActionDate	PID	Prefix	First	Middle	Last	Suffix	Street
1	Volunteer	Set-up	4/30/20	2727338		Sofa		Amaya		9330 Ogletth Drive
2	Volunteer	Check-in	2/14/20	2727338		Sofa		Amaya		9330 Ogletth Drive
3	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
4	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
5	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
6	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
7	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
8	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
9	Volunteer	Office - IT Support	4/30/19	2727334	Mr.	Joseph	M.	Banks	Sr.	1593 Spring I
13	Volunteer	Booth	7/31/20	2	Mr.	Kevin	L.	Abel		29 Norton St

NOTE: For more information on Actions, see [Julep - Actions](#).