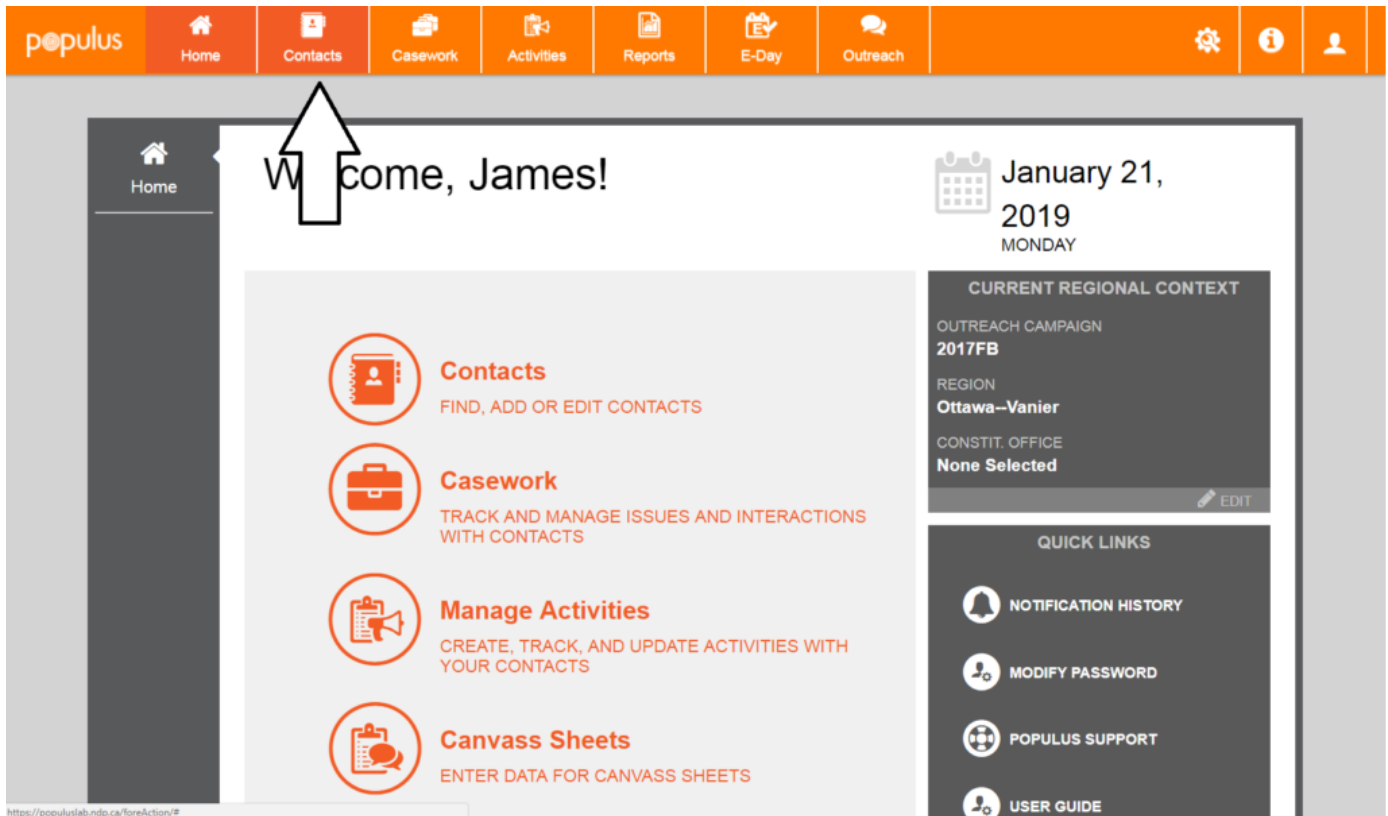


Basic and Advanced Search

The search page allows you to quickly find individuals in the database. Once found, you can view their donation history, canvass marks from past elections, and household information.

Basic Search

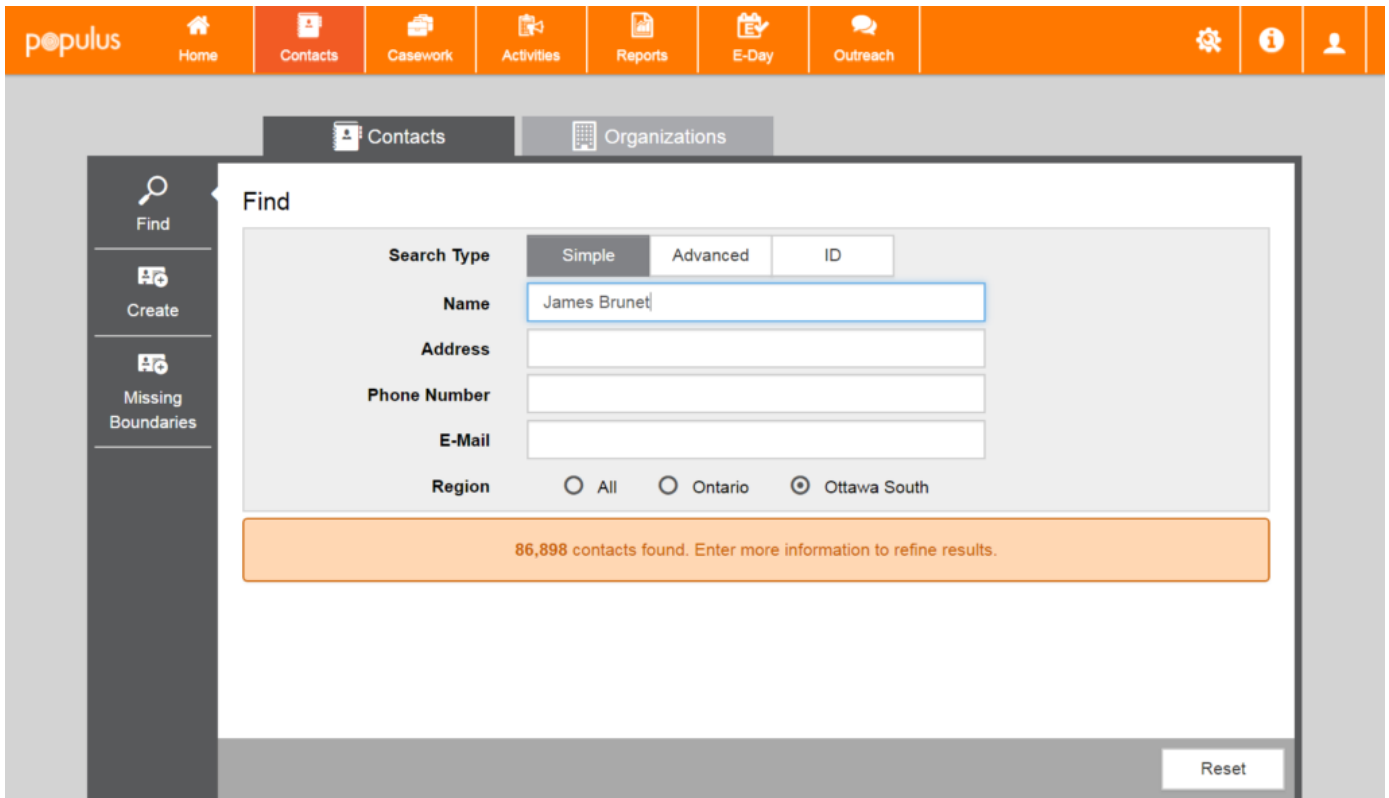


The screenshot displays the Populus web application interface. At the top, there is an orange navigation bar with the following tabs: Home, Contacts, Casework, Activities, Reports, E-Day, and Outreach. The 'Contacts' tab is highlighted, and a white arrow points to it from the text 'Welcome, James!' below. The main content area is divided into several sections:

- Home:** A dark sidebar on the left with a 'Home' button.
- Welcome, James!:** A large white area with a calendar icon and the date 'January 21, 2019 MONDAY'.
- Contacts:** A section with a red icon of a contact card, the title 'Contacts', and the description 'FIND, ADD OR EDIT CONTACTS'.
- Casework:** A section with a red icon of a briefcase, the title 'Casework', and the description 'TRACK AND MANAGE ISSUES AND INTERACTIONS WITH CONTACTS'.
- Manage Activities:** A section with a red icon of a megaphone, the title 'Manage Activities', and the description 'CREATE, TRACK, AND UPDATE ACTIVITIES WITH YOUR CONTACTS'.
- Canvass Sheets:** A section with a red icon of a clipboard, the title 'Canvass Sheets', and the description 'ENTER DATA FOR CANVASS SHEETS'.
- CURRENT REGIONAL CONTEXT:** A dark grey box containing the following information:
 - OUTREACH CAMPAIGN: 2017FB
 - REGION: Ottawa--Vanier
 - CONSTIT. OFFICE: None Selected
 - An 'EDIT' button with a pencil icon.
- QUICK LINKS:** A dark grey box containing the following links:
 - NOTIFICATION HISTORY
 - MODIFY PASSWORD
 - POPULUS SUPPORT
 - USER GUIDE

The URL at the bottom left is <https://populuslab.ndp.ca/fore/action/#>.

First, head over to the **Contacts** tab in the top navigation bar

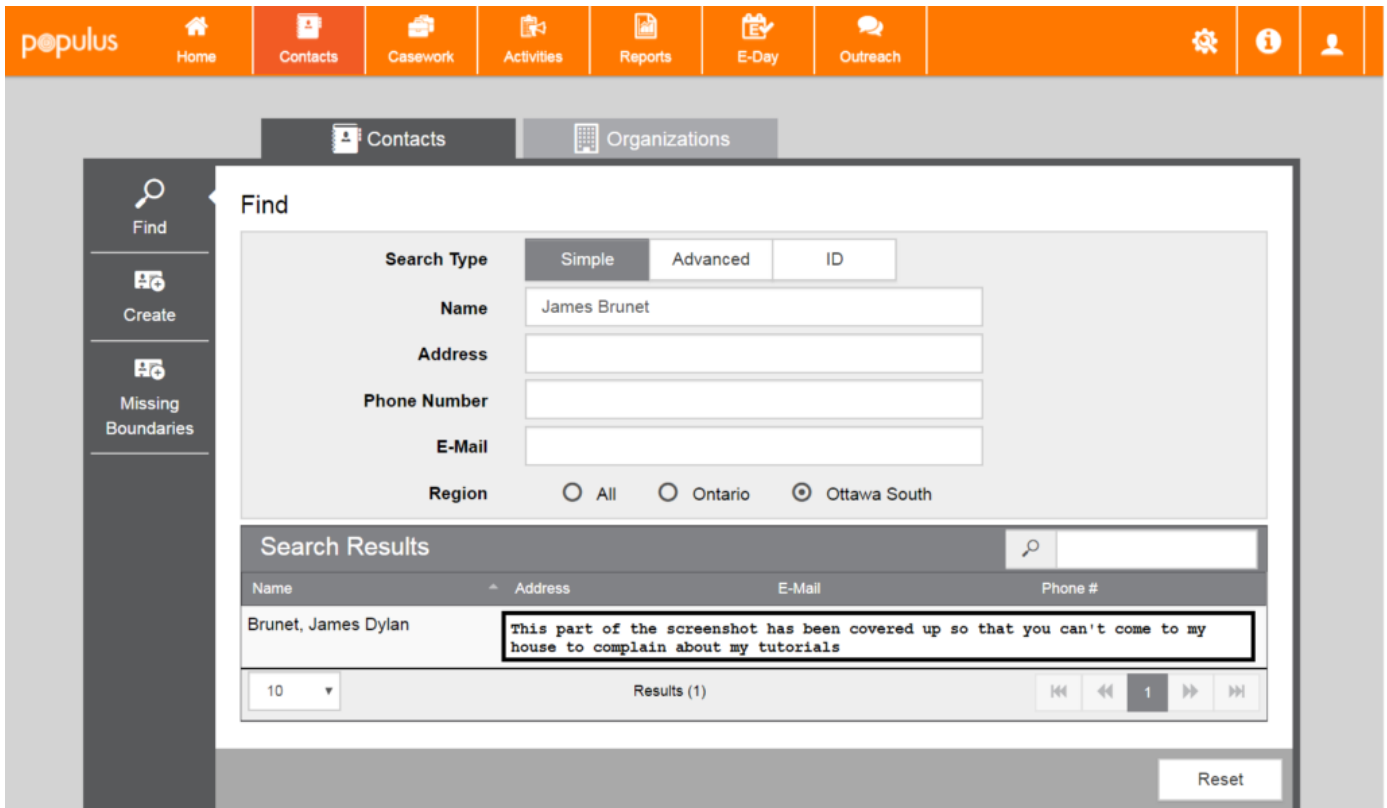


Make sure you're on the **Contacts** tab on the top and the **Find** tab on the left—these should be selected by default. Then, enter information about the person you're looking for.

Populus will begin searching for a person as soon as you start typing. However, searching might take a while and it might seem like nothing is happening. If you see no search results after a while, take a look at the number of contacts found (right below the email field): if it's more than 200, you should narrow it down further to get results.

If absolutely nothing happens after waiting patiently, and it looks like the number of contacts available is stuck at a really high number no matter what you do, try refreshing the page.

You may have the option to **Force Search**. This will require Populus to give you the (very large) list of everyone who matches the criteria. It'll take a long time to sift through that to find the person you want, so only do this if you have no other way to narrow down the list.

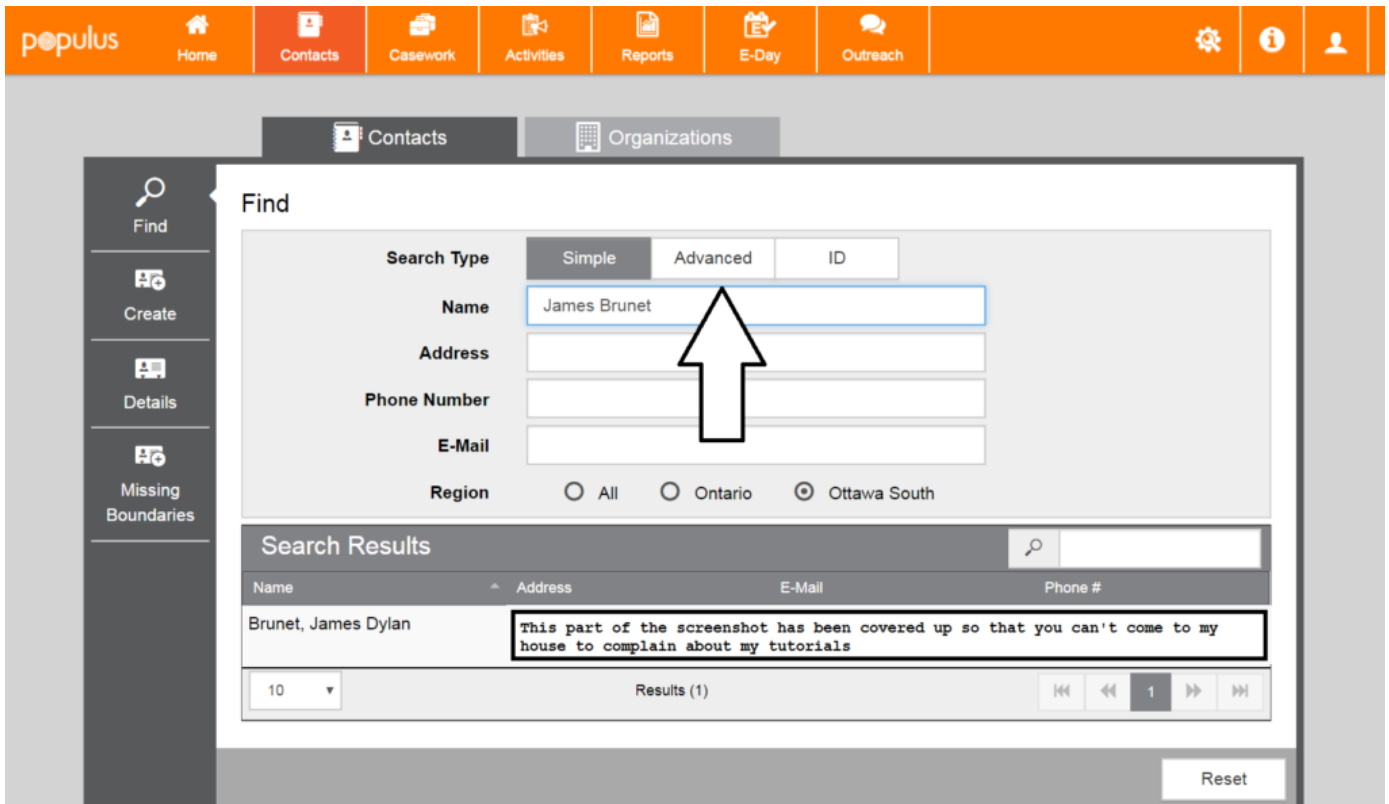


This is what the search results will look like if you narrow it down to just one person (me!). To view information about a person in the result of a search, click on their **Contact Profile**.

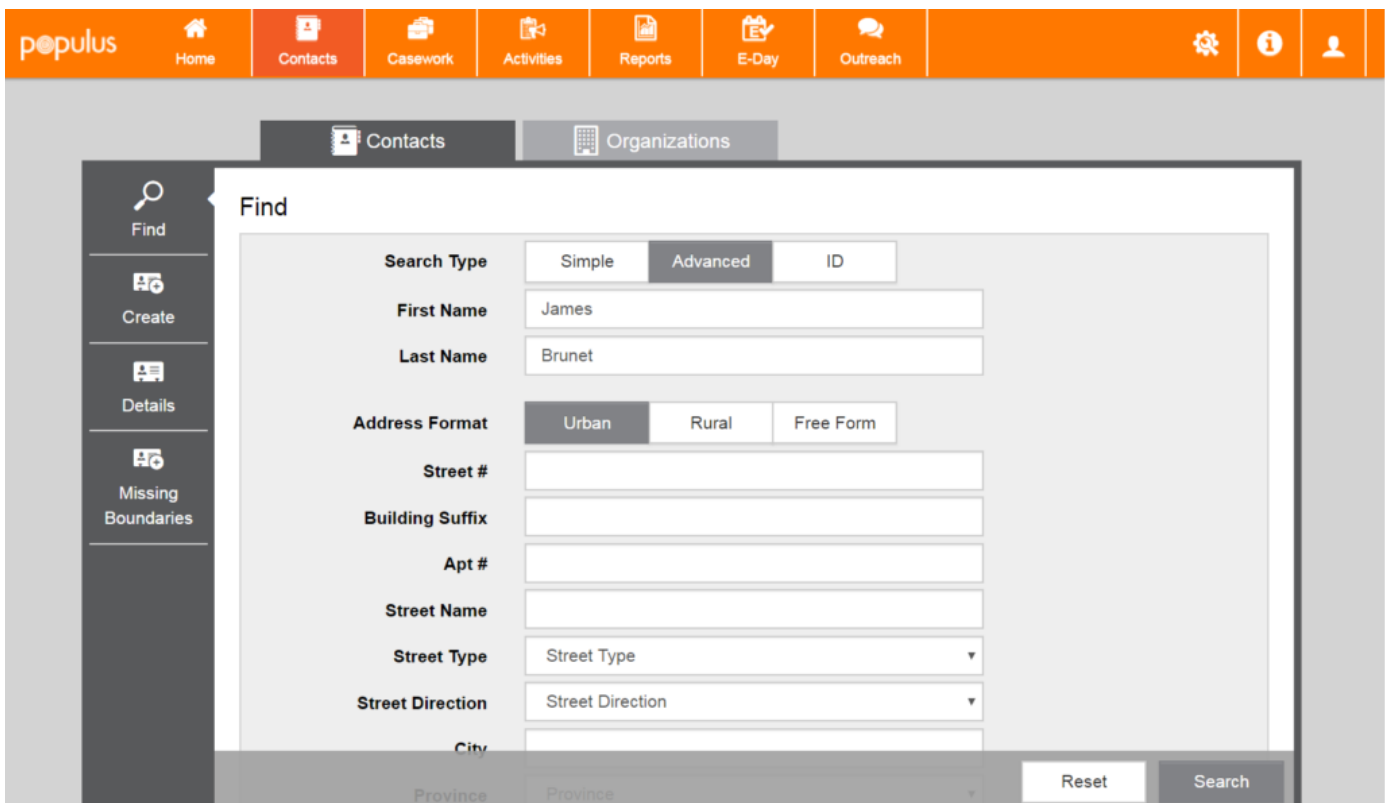
If you want to learn how to read someone's contact profile, check out the **Overview of Contact Profile** tutorial.

Advanced Search

The advanced search allows you to be more precise with your search queries if you're having trouble finding someone: you can specify a specific first name, search by specific parts of the address, or search by city.



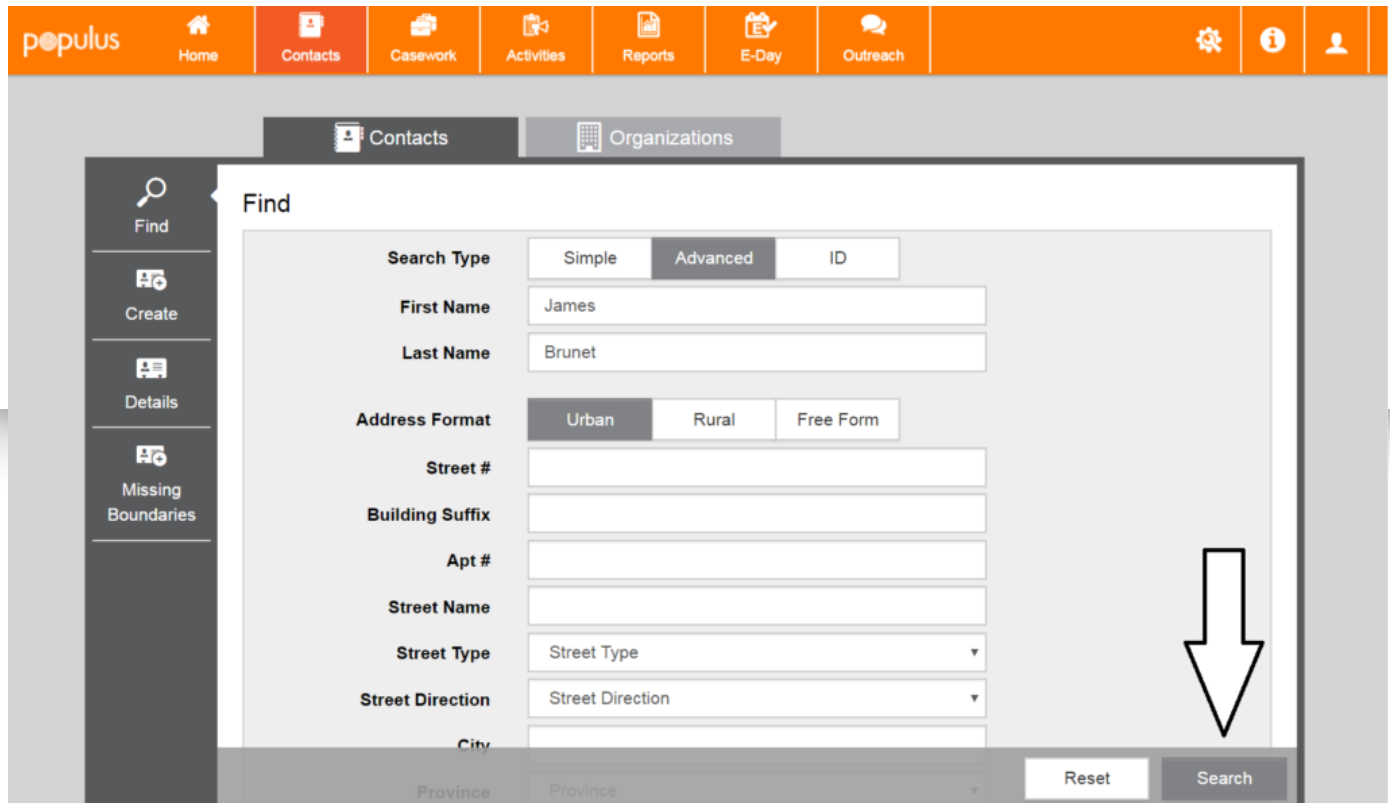
To find the advanced search window, follow the same instructions (at the top of this page) to find the simple search window, and then click **Advanced** in the **Search Type** field.



The advanced search window allows you to specify less common address formats (like rural

addresses or reserves).

It also lets you specify if you searching for a first or last name–this can come in handy: With the simple search if you type in “James” it will attempt to match that to the first, middle and last names of people in the database. EG: **James** Brunet, Donald **Jameson**, Curtis **James** Jackson III.



The screenshot displays the 'Find' search interface in the Populus application. The interface is divided into a top navigation bar with icons for Home, Contacts, Casework, Activities, Reports, E-Day, and Outreach, along with settings, help, and user profile icons. Below this is a secondary navigation bar with 'Contacts' and 'Organizations' tabs. The main search area is titled 'Find' and contains a search form. The form includes a 'Search Type' section with radio buttons for 'Simple', 'Advanced', and 'ID'. The 'Advanced' search type is selected. Below this are input fields for 'First Name' (containing 'James') and 'Last Name' (containing 'Brunet'). There is an 'Address Format' section with radio buttons for 'Urban', 'Rural', and 'Free Form'. Below this are several empty input fields for 'Street #', 'Building Suffix', and 'Apt #'. There are also dropdown menus for 'Street Type' and 'Street Direction'. At the bottom of the form are 'Reset' and 'Search' buttons. A large white arrow points to the 'Search' button.

Unlike with the simple search, with the advanced search **Populus does not begin searching for a person as soon as you start typing**. In order to execute a search, you'll need to click the **Search** button in the bottom right corner.

To view information about a person in the result of a search, click on their name to view their **Contact Profile**.

If you want to learn how to read someone's contact profile, check out the **Overview of Contact Profile** tutorial.