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# Teach Yourself Custom Queries

## A Low-Stress, Self-Paced Tutorial

### How to Use This Guide

This guide contains information and instructions church workers and volunteers can use to learn about Realm custom reports (also called queries). You may copy and/or modify the descriptions to suit your needs. For example, some churches post this information online. Some distribute it in their own printed materials.

# Introduction

A custom report or "query" is just a search of all your realm profiles. It finds a very specific list of those people whose records meet certain characteristics.

With that list you can then fulfill dozens of amazing ministry projects. And believe me when I say: this could be the most important single thing you learn to do in Realm.

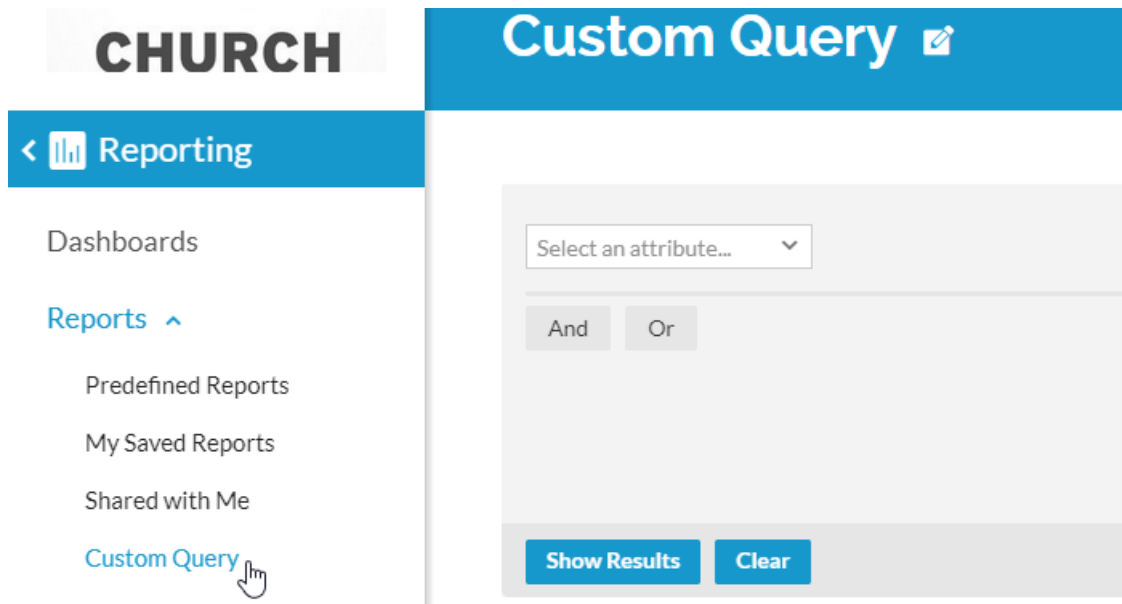
First, I'll show you one example of a query. Then, you'll have the chance to make a few for yourself.



# Creating a Search

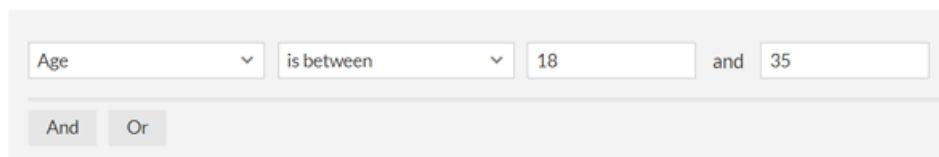
I want to mail invitations for people to join a new, young-adult class. The people I want to target are between 18 and 35 and live in town. Their names are hiding somewhere in all those Realm profiles, so this is a perfect job for a custom query.

I log in, go to the **Custom Query** page...



...and begin entering attributes—the characteristics that narrow down, to just the targeted records, the list I want to create.

First, I only want to include people aged 18 to 35. Notice, when you click the first attribute, other fields open up that let you enter specifics. Here's what the whole line finally looks like:



But I can tighten the focus even more. I only want to send the invitations to people who live in town. Nonresident military, college students, and visitors wouldn't be interested. I click And to add a second attribute:

Age  is between  and

and Address City  is equal to

[→ Add More Criteria](#)

And Or

[Show Results](#) [Clear](#)

This treats the query like two sentences: "First, show me everybody between 18 and 35. Second—of those—show only people who live in town."

Notice you can also choose **Or**. We'll talk about that later. That's it. I click **Show Results**, and Realm displays the list:

### Custom Query

Select an action... 63 [+ New Report](#) [Save As](#)

[Edit Columns](#) [Edit Report](#)

<input checked="" type="checkbox"/>	Name ^	Age	Address City (Primary)	Address City (Alternate)	Address City (Mailing)
<input checked="" type="checkbox"/>	Donna' LuAnne Aaron donnaluannearon@example.org (888) 777-6665	30 years	Florence	--	Florence
<input checked="" type="checkbox"/>	John Ackerman, Jr. JohnAckerman@example.org (843) 555-1234	20 years	Florence	--	Florence
<input checked="" type="checkbox"/>	Ellie Anders	32 years	Florence	--	Florence
<input checked="" type="checkbox"/>	Mikki Anderson mikki@example.org (843) 555-8499	31 years	Florence	South Lake Tahoe	Florence

I can now use this list to create mailing labels for invitations.

I make sure the check box next to everybody's name is selected, which it is by default. Then I click the print icon, and select **Labels**.

Select an action... 63 [+ New Report](#) [Save As](#)

Name ^ Age Address City (Primary) Address City (Alternate) Address City (Mailing)

Donna' LuAnne Aaron  
donnaluannearon@example.org  
(888) 777-6665

John Ackerman, Jr.  
JohnAckerman@example.org

30 years

20 years

Florence

- PDF Document (pdf)
- Labels**
- List (csv)
- Family Directory

Choose **Individual Label** and click **Run**. Individual labels include only the selected member of the household, nobody else in their families.

The result is a ready-to-print list that I can **Download** as a .pdf file to use later, or send to my printer now.

## The Or Button

You can click the **Or** button to expand your search and include more results. Here's an example.

My church is setting up three new food drive locations in town—one each in Maplewood, Oakdale, and Pineville. The rest of city is covered by other drop-off points, so I just want to notify congregants in these three areas where they can donate their canned goods.

My church tracks areas of town using a field we created called "Community." So my query would look like this:

The screenshot shows a search interface with three criteria for the field "Community". Each criterion is set to "is equal to" and includes a value: "Maplewood", "Oakdale", and "Pineville". The criteria are connected by "or" operators. Below each criterion is a button labeled "Add another And". At the bottom of the interface, there are buttons for "And" and "Or", and two main buttons: "Show Results" and "Clear".

Some people might assume using **Or** will narrow their search. In fact, the opposite is true. It increases your search results and lets you include records that might, otherwise, have nothing in common.

Think of it this way. You send your son to the pet store and say, "Bring me back all animals that croak and bark and meow." He returns empty handed. No one animal makes all those sounds.

If you said, "Bring me back all animals that croak," he will return with a box of frogs.

But, if you said, "Bring me back all animals that croak or bark or meow," you could open your own petting zoo.

Each **Or** broadens your search and, probably, lengthens your final list of names.

# Try a Few Queries

## Exercises

Open Realm and try these exercises on your own.

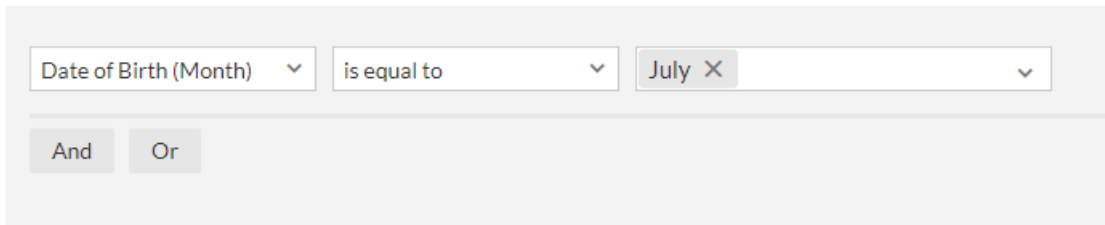
The answers are on the pages that follow, but, if you peek early, nobody will know.

1. Suppose you want to send birthday wishes to everyone born in July. Once you have your list, how would you send them all an email?
2. Let's say you want to find everybody whose profile was added this year AND who lives in your city. Then, how would you send everybody on this list an invitation to join Realm?
3. You want to get the word around town about your Christmas concert. One way is to contact everyone who uses social media and ask them to advertise it. Locate all congregants with a social media account.
4. Challenge exercise: Find all the children in a particular Sunday school class (like "3rd Grade") with birthdays in November. Hint: classes are just "Groups", and all groups are all part of a "Ministry Area".

# Answers

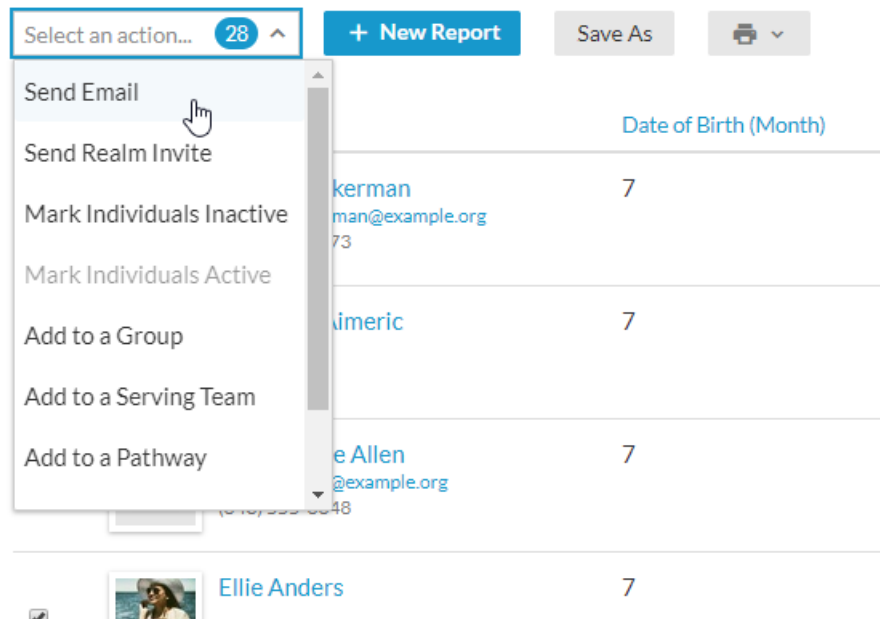
1—Suppose you want to send birthday wishes to everyone born in July. Once you have your list, how would you send them all an email?

Search setup:



A screenshot of a search filter interface. It shows a dropdown menu for "Date of Birth (Month)" with "July" selected. Below it, the text "is equal to" is followed by another dropdown menu also showing "July". There are "And" and "Or" buttons below the filter fields.

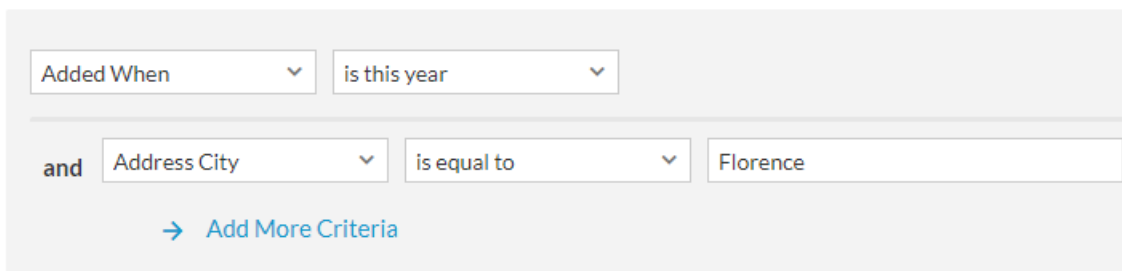
Creating emails:



A screenshot of a user interface. At the top, there is a dropdown menu labeled "Select an action..." with "28" items and an upward arrow. Below it, a dropdown menu is open, showing options: "Send Email", "Send Realm Invite", "Mark Individuals Inactive", "Mark Individuals Active", "Add to a Group", "Add to a Serving Team", and "Add to a Pathway". A hand cursor is over "Send Email". To the right, there is a table with a header "Date of Birth (Month)". The table has several rows with names and birth months. The visible rows are: "kerman" (7), "man@example.org" (73), "imeric" (7), "e Allen" (7), "@example.org" (48), and "Ellie Anders" (7). There are also buttons for "+ New Report", "Save As", and a printer icon.

2—Let's say you want to find everybody whose profile was added this year AND who lives in your city. Then, how would you send everybody on this list an invitation to join Realm.

Search setup:



A screenshot of a search filter interface. It shows a dropdown menu for "Added When" with "is this year" selected. Below it, the text "and" is followed by a dropdown menu for "Address City" with "Florence" selected. There is a button labeled "Add More Criteria" with a right arrow.

Sending Realm invites:

The screenshot shows a search filter interface with the following elements:

- Top row: A dropdown menu with "LinkedIn Link" and a "▼" arrow, followed by a dropdown menu with "is not blank" and a "▼" arrow.
- Below the top row: A button with an upward arrow and the text "Add another And".
- Separator: A horizontal line with the word "or" centered below it.
- Second row: A dropdown menu with "Twitter Link" and a "▼" arrow, followed by a dropdown menu with "is not blank" and a "▼" arrow.
- Below the second row: Two buttons labeled "And" and "Or".
- Bottom row: Two buttons labeled "Show Results" and "Clear".

3—You want to get the word around town about your Christmas concert. One way is to contact everyone who uses social media and ask them to advertise it. Locate all congregants with a social media account.

Search setup:

The screenshot shows a search filter interface with the following elements:

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- Separator: A horizontal line with the word "or" centered below it.
- Second row: A dropdown menu with "Twitter Link" and a "▼" arrow, followed by a dropdown menu with "is not blank" and a "▼" arrow.
- Below the second row: Two buttons labeled "And" and "Or".
- Bottom row: Two buttons labeled "Show Results" and "Clear".



4— Challenge exercise: Find all the children (not the teachers or guests) in a particular Sunday school class (like "3rd Grade") with birthdays in November. Hint: classes are just "Groups", and all groups are all part of a "Ministry Area".

Search setup:

The screenshot shows a search criteria builder interface with the following criteria:

- Ministry Area is equal to Children's Division
- Group is equal to 3rd Grade
- Roster Type is equal to Member
- Date of Birth (Month) is equal to November

There is a blue link labeled "Add More Criteria" and two buttons labeled "And" and "Or" at the bottom.

The attribute "Group" isn't visible until you select the Ministry Area that contains your group. At our church, for instance, the 3rd Grade group is contained in the Children's Division ministry area. Once you select that, you can "Add More Criteria" to find the group.

And by including the "Roster Type" of "Member", you will only find regular students, not "Guests", and teachers are typically assigned a roster type of "Leader."

### More Practice

FINALLY, don't worry if you didn't get all of these. Over time, you'll learn each of the attributes and when to use it. To become an expert, come up with some specific examples of queries that you could use in your daily job. Ask teachers, leaders, clergy and other people at church what information they need and try to create queries around those requests.

# Extra Stuff

## Saving Your Report

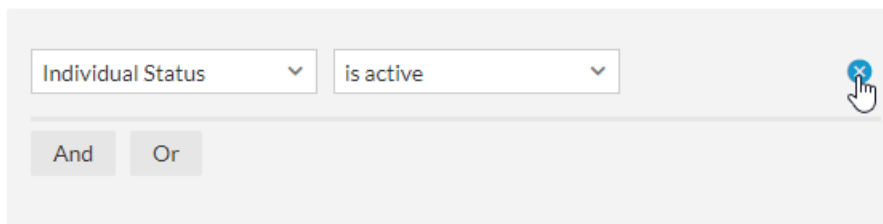
So you've run your report, and you like the way it works. You might even run it again in the future. Can you?

Definitely. On the results page, click **Save As** and give your new creation a name and description.

To find and run it again, click **My Saved Reports**.

## Backing Out

If you add a line that you don't want to use, notice the blue delete icon when you point to the row. Click it to delete that attribute only.



## Edit Columns

By default, the results of your report include a column for each of the attributes you used. So in the challenge exercise above, the results included columns for Ministry Area, Group, etc. But suppose you wanted to see the address of each class member, even though it wasn't part of your query.

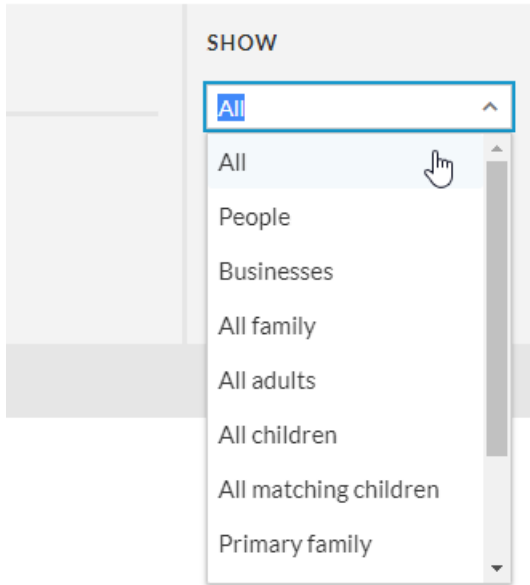
From the results page, click **Edit Columns**, and add columns to show any information you want to see. This will not change your basic query.

## Edit Report

You might want to change or add just one attribute without having to re-create your query. To do so, click Edit Report, make your changes, and click Show Results.

# Show Menu Options

If you want to further customize your search, you can select an option from the **Show** drop-down menu.



Here's what these options do.

## People and Business Options

All	Displays everyone who matches all of the query's criteria.
People	Displays individuals who match all of the query's criteria.
Orgs/Businesses	Displays businesses who match all of the query's criteria.
All Family	Displays the entire family if anyone in the family matches all of the query's criteria. This includes children who are attached to multiple families.
All Adults	Displays all individuals who have the adult family position if anyone in the family matches all of the query's criteria.
All Children	Displays all individuals who have the children family position if anyone in the family matches all of the query's criteria.
All Matching Children	Displays all individuals who have the children family position when the individuals match all of the query's criteria.

## Primary Family Options

When a child is linked to two families, and you have both of the child's parents in Realm, one family is designated as the primary.

Primary Family	Displays the entire primary family if anyone in the primary family matches all of the query's criteria.
Primary Adult	Displays all individuals of the primary family who have the adult family position if anyone in the primary family matches all of the query's criteria.
Primary Children	Displays all individuals of the primary family who have the children family position if anyone in the primary family matches all of the query's criteria.

## Giving Options

Contributor View	Requires the Giving Amount or Pledge Amount attribute.
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