

Fundraisers Cheat Sheet for Creating Donor Smart Groups

People with Valid Postal Addresses

GEN Good Postal Addresses Group

Search>Search Builder

Home » CiviCRM » Find Contacts

Search Builder

▼ Search Criteria ?

Include contacts where

Contacts ▼ Postal Code ▼ Primary ▼ IS NOT NULL ▼

» Another search field

» Also include contacts where

Search

People with Valid Email Addresses

GEN Good Email Addresses Group

Search>Advanced Search

Home » CiviCRM » Find Contacts

Advanced Search

▼ Search Criteria ?

▼ Basic Criteria

Complete OR Partial Name Complete OR Partial Email Search Views ? Display Results As ?

Complete OR Partial Email: %@%

Search View: Name Address Constituent type ▼ Contacts ▼

Contact Type(s) Group(s) (search by group type) Search Operator ? Search in Trash (deleted contacts)

- select - ▼ - select - ▼ AND ▼

Select Tag(s) All Tags ?

- select - ▼

Phone Number Phone Location Phone Type

- any - ▼ - any - ▼

Punctuation and spaces are ignored.

Exclude Include by Privacy Option(s) ? Preferred Communication Method

Phone Email Postal Mail SMS Fax

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Donors who gave last year but not this year:

LYBUNT group

Search>Advanced Search

Custom Fields

The screenshot shows a 'Summary Fields' search interface with the following fields:

- Total Lifetime Contributions: From [] To []
- Total Contributions this Year: From [] To [1]
- Total Contributions last Year: [1] To []
- Amount of last contribution: From [] To []
- Date of Last Contribution - From: [] (clear) To [] (clear)
- Date of First Contribution - From: [] (clear) To [] (clear)
- Largest Contribution From: [] To []
- Count of Contributions From: [] To []
- Average Annual (Calendar Year) Contribution From: [] To []
- Date of Last Membership Payment - From: [] (clear) To [] (clear)
- Amount of Last Membership Payment From: [] To []
- Name of the last attended event From: [] To []
- Date of the last attended event - From: [] (clear) To [] (clear)

Lapsed donors to recover:

FR SYBUNT Group

Search>Advanced Search

Custom Fields

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Summary Fields

Total Lifetime Contributions From To

Total Contributions this Year From To

Total Contributions last Year From To

Amount of last contribution From To

Date of Last Contribution - From (clear) To (clear)

Date of First Contribution - From (clear) To (clear)

Largest Contribution From To

Count of Contributions From To

Average Annual (Calendar Year) Contribution From To

Date of Last Membership Payment - From (clear) To (clear)

Amount of Last Membership Payment From To

Name of the last attended event From To

Date of the last attended event - From (clear) To (clear)

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To find who responded to a specific appeal method:

The screenshot shows a web-based filter interface for 'Contributions'. The interface is organized into several sections with various input fields and checkboxes. At the bottom, a dark blue bar contains a list of appeal methods with checkboxes. The 'Donor Responded To' checkbox is highlighted in yellow and is checked. Other visible options include Direct Mail, Phone Call, E-mail, Personal Visit, Personal Letter, and Unknown. There are also checkboxes for 'Check to match ANY; unchecked to match ALL'.

Contributions

Contribution Dates: - any -

Contribution Amounts: From [] To []

Payment Method: - any -

Thank-you sent?: Yes No (clear)

Receipt sent?: Yes No (clear)

Contribution is a Test?: Yes No (clear)

Financial Type: - any -

In Honor Of: []

Personal Campaign Page: - any -

Currency: - any -

Campaigns: - select -

Contribution Status: Completed Pending Cancelled Failed Refunded

Transaction ID: []

Contribution is Pay Later?: Yes No (clear)

Contribution is Recurring?: Yes No (clear)

Contribution Page: - any -

Contribution Source: []

Personal Campaign Page Honor Roll?: Yes No (clear)

Contributions

Donor Responded To Direct Mail Phone Call E-mail Personal Visit Personal Letter Unknown Check to match ANY; unchecked to match ALL

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This year's donors who could be asked again:

FR Donors this year

Search>Advanced Search

Custom Fields

The screenshot shows a 'Summary Fields' search filter interface. It contains the following fields and options:

- Total Lifetime Contributions: From [] To []
- Total Contributions this Year: From [1] To []
- Total Contributions last Year: From [] To []
- Amount of last contribution: From [] To []
- Date of Last Contribution - From: [] (clear) To: [] (clear)
- Date of First Contribution - From: [] (clear) To: [] (clear)
- Largest Contribution From: [] To []
- Count of Contributions From: [] To []
- Average Annual (Calendar Year) Contribution From: [] To []
- Date of Last Membership Payment - From: [] (clear) To: [] (clear)
- Amount of Last Membership Payment From: [] To []
- Name of the last attended event From: [] To []
- Date of the last attended event - From: [] (clear) To: [] (clear)

Loyal Donors: Donors who have given 2+ (or more) consecutive years

Smart Groups: Donors Prior Years

Search>Advanced Search

Contributions Tab

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The screenshot shows a 'Contributions' form with various filters and options. The 'Contribution Dates' section has a dropdown menu set to 'Prior to Previous Year'. The 'Contribution Amounts' section has 'From' and 'To' input fields. The 'Payment Method' is set to '- any -'. There are radio buttons for 'Thank-you sent?', 'Receipt sent?', and 'Contribution is a Test?'. The 'Financial Type' is set to '- any -'. The 'In Honor Of' field is empty. The 'Personal Campaign Page' is set to '- any -'. The 'Currency' is set to '- any -'. The 'Campaigns' dropdown is set to '- select -'. On the right side, there are checkboxes for 'Contribution Status' (Completed, Pending, Cancelled, Failed, Refunded), a 'Transaction ID' field, and radio buttons for 'Contribution is Pay Later?' and 'Contribution is Recurring?'. There are also dropdowns for 'Contribution Page' and 'Contribution Source', and a radio button for 'Personal Campaign Page Honor Roll?'.

Search>Search Builder

The screenshot shows the 'Search Builder' interface. It has a 'Search Criteria' section with a question mark icon. Below it is the heading 'Include contacts where'. There are two rows of search criteria. Each row has a 'Contacts' dropdown, a 'Group(s)' input field, and an 'IN' dropdown. To the right of each row is a list of search criteria: 'FR Donor Solicitors', 'FR Donors', 'FR Non Donors', and 'FR Donors 2011' (highlighted in blue). The second row also has a list of search criteria: 'FR Donors', 'FR Non Donors', 'FR Donors 2011', and 'FR Donors 2012' (highlighted in blue). At the bottom, there is a link '» Another search field' and a partially visible link '» Also include contact status'.