

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 ⓘ
<input type="text"/>	<input type="text" value="%%@%"/>	Search View: Name Address Constituent type ▼	Contacts ▼
Contact Type(s)	Group(s) (search by group type)	Search Operator ⓘ	<input type="checkbox"/> Search in Trash (deleted contacts)
- select - ▼	- select - ▼	AND ▼	
Select Tag(s)	All Tags ⓘ		
- select - ▼	<input type="text"/>		
Phone Number	Phone Location	Phone Type	
<input type="text"/>	- any - ▼	- any - ▼	

Punctuation and spaces are ignored.

Exclude Include by Privacy Option(s) ⓘ

Preferred Communication Method

Phone Email Postal Mail SMS Fax

Fundraisers Cheat Sheet for Creating Donor Smart Groups

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: From [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

Fundraisers Cheat Sheet for Creating Donor Smart Groups

Summary Fields

Total Lifetime Contributions	<input type="text" value="1"/>	To	<input type="text"/>		
From					
Total Contributions this Year	<input type="text"/>	To	<input type="text" value="1"/>		
From					
Total Contributions last Year	<input type="text"/>	To	<input type="text" value="1"/>		
From					
Amount of last contribution	<input type="text"/>	To	<input type="text"/>		
From					
Date of Last Contribution -	<input type="text"/>	<input type="text" value="(clear)"/>	To	<input type="text"/>	<input type="text" value="(clear)"/>
From					
Date of First Contribution -	<input type="text"/>	<input type="text" value="(clear)"/>	To	<input type="text"/>	<input type="text" value="(clear)"/>
From					
Largest Contribution From	<input type="text"/>	To	<input type="text"/>		
Count of Contributions From	<input type="text"/>	To	<input type="text"/>		
Average Annual (Calendar Year) Contribution From	<input type="text"/>	To	<input type="text"/>		
Date of Last Membership Payment -	<input type="text"/>	<input type="text" value="(clear)"/>	To	<input type="text"/>	<input type="text" value="(clear)"/>
From					
Amount of Last Membership Payment From	<input type="text"/>	To	<input type="text"/>		
Name of the last attended event From	<input type="text"/>	To	<input type="text"/>		
Date of the last attended event -	<input type="text"/>	<input type="text" value="(clear)"/>	To	<input type="text"/>	<input type="text" value="(clear)"/>
From					

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To find who responded to a specific appeal method:

The image shows a screenshot of a CRM interface for filtering contributions. The title bar reads "Contributions". The filter options are organized into several sections:

- Contribution Dates:** A dropdown menu set to "- any -".
- Contribution Amounts:** Two input fields labeled "From" and "To".
- Payment Method:** A dropdown menu set to "- any -".
- Thank-you sent?:** Radio buttons for "Yes" and "No (clear)".
- Receipt sent?:** Radio buttons for "Yes" and "No (clear)".
- Contribution is a Test?:** Radio buttons for "Yes" and "No (clear)".
- Financial Type:** A dropdown menu set to "- any -".
- In Honor Of:** An input field.
- Personal Campaign Page:** A dropdown menu set to "- any -".
- Currency:** A dropdown menu set to "- any -".
- Campaigns:** A dropdown menu set to "- select -".
- Contribution Status:** Checkboxes for "Completed", "Pending", "Cancelled", "Failed", and "Refunded".
- Transaction ID:** An input field.
- Contribution is Pay Later?:** Radio buttons for "Yes" and "No (clear)".
- Contribution is Recurring?:** Radio buttons for "Yes" and "No (clear)".
- Contribution Page:** A dropdown menu set to "- any -".
- Contribution Source:** An input field.
- Personal Campaign Page Honor Roll?:** Radio buttons for "Yes" and "No (clear)".

At the bottom of the filter area, there is a section titled "Contributions" with a sub-section "Donor Responded To" highlighted in yellow. This section contains a list of appeal methods with checkboxes:

- Direct Mail
- Phone Call
- E-mail
- Personal Visit
- Personal Letter
- Unknown
- Check to match ANY; uncheck 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' section with the following filters:

- 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

Fundraisers Cheat Sheet for Creating Donor Smart Groups

The screenshot shows a 'Contributions' form with the following sections:

- Contribution Dates:** A dropdown menu set to 'Prior to Previous Year'.
- Contribution Amounts:** 'From' and 'To' input fields.
- Payment Method:** A dropdown menu set to '- any -'.
- Thank-you sent?** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.
- Receipt sent?** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.
- Contribution is a Test?** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.
- Financial Type:** A dropdown menu set to '- any -'.
- In Honor Of:** An input field.
- Personal Campaign Page:** A dropdown menu set to '- any -'.
- Currency:** A dropdown menu set to '- any -'.
- Campaigns:** A dropdown menu set to '- select -'.
- Contribution Status:** Checkboxes for 'Completed', 'Pending', 'Cancelled', 'Failed', and 'Refunded'. All are unchecked.
- Transaction ID:** An input field.
- Contribution is Pay Later?:** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.
- Contribution is Recurring?:** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.
- Contribution Page:** A dropdown menu set to '- any -'.
- Contribution Source:** An input field.
- Personal Campaign Page Honor Roll?:** Radio buttons for 'Yes' and 'No (clear)'. 'No' is selected.

Search>Search Builder

The screenshot shows the 'Search Builder' interface with the following elements:

- Search Criteria:** A dropdown menu with a help icon.
- Include contacts where:** A section with two rows of search criteria.
 - Row 1: 'Contacts' dropdown, 'Group(s)' dropdown, 'IN' dropdown, and a list of options: 'FR Donor Solicitors', 'FR Donors', 'FR Non Donors', and 'FR Donors 2011' (highlighted).
 - Row 2: 'Contacts' dropdown, 'Group(s)' dropdown, 'IN' dropdown, and a list of options: 'FR Donors', 'FR Non Donors', 'FR Donors 2011', and 'FR Donors 2012' (highlighted).
- Another search field:** A link to add more criteria.