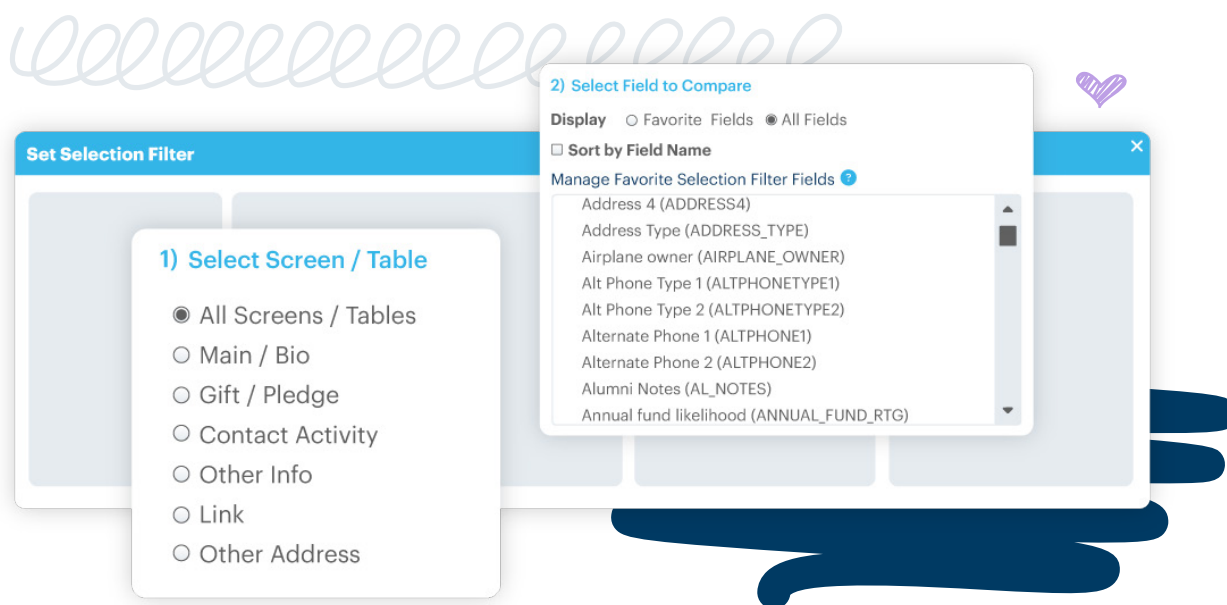


WHAT ARE SELECTION FILTERS?

Selection Filters allow you to select a small number of records in your database that have one or more characteristics in common, and then group them together to run lists, mailings or reports using only those records.



The Selection Filter Process

Much of the work to build an effective Selection Filter starts before you even enter DonorPerfect. Ahead of time, determine what records you want to see. Try to be as specific as possible.

For example, do you want to see all donors who gave more than \$20,000 this year? From all states or just a few? Does that include pledge payments too? Gathering as much information as possible before you start will help make the results of your Selection Filter, and the reports, mailings and lists they are used in, even more successful.

Before you begin, try to answer the questions outlined in the Selection Filter Process below:

THE SELECTION FILTER PROCESS

1. What type of data do I want in my list, mailing or report?

Donor Record:

Main & Bio

Transactional:

Gift, Pledge, Links, Contact, Other Info, Addresses

2. What field am I filtering on?

Donor Record:

Ex: Last Name, Gift Total, State, City, Zip Code, Calendar Year-to-Date

Transactional:

Ex: Gift Amount, General Ledger, Pledge Date, Solicitation, Contact Date

3. How am I comparing my fields?

Examples:

Exactly Equal to, Less Than, Contains, Is Null (blank)

4. What value am I trying to find?

This depends on your needs.

For example, you might enter "PA" if you are searching for Donor Records where STATE is exactly equal to Pennsylvania.

After you've determined what information is needed, use Selection Filters to [select which screen](#) or table the data is found in, which field within the screen/table applies to the filter, how to compare the field so that only the data you want is returned in the filter and ultimately what value to find.

Simple Filters vs. Compound Filters

Simple Filters select records that match one or more sets of criteria contained in the filter. Examples of simple filters include:

- Select all donors who gave more than \$20,000 this year
- Select all gifts larger than \$500
- Select all donors who gave a donation this year
- Select all donors whose last gift was less than \$100
- Select all donors with a net worth greater than a million dollars

Compound Filters are made by combining multiple simple filters (or even other compound filters), and can be used to perform more complex selections such as:

- Select the donors who are worth more than a million dollars, but leave out the ones whose last gift was less than \$100

Only the records that test positive for the selection criteria will show up in the lists, mailings or reports that are set to use the selection filter. Records that don't meet the selection criteria will not appear as long as the selection filter is in use.

Sharing Filters

You can share filters with other DonorPerfect users. If the **Share Across All Users** option is checked, the filter will be available for all users to see. Users with security rights access will be able to edit and delete all filters. Users that do not have security rights will be able to see shared filters, but cannot edit or delete them.

If a filter is not shared, then only the user that created the filter will be able to see that filter. Of course, if a user creates a filter, that user will be able to edit or delete that filter, regardless of their security rights.