Fundraisers Cheat Sheet for Creating Donor Smart Groups

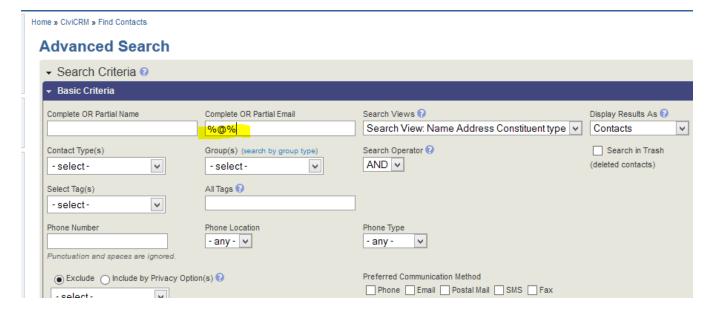## People with Valid Postal Addresses

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 ? |
| | %@% | Search View: Name Address Constituent type ▾ | Contacts ▾ |

| Contact Type(s) | Group(s) (search by group type) | Search Operator ? | ☐ Search in Trash |
| - select - ▾ | - select - ▾ | AND ▾ | (deleted contacts) |

| 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

- select - ▾

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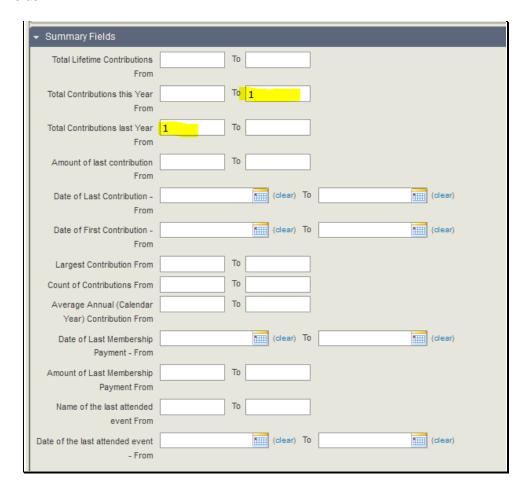
Donors who gave last year but not this year:

LYBUNT group

Search>Advanced Search

Custom Fields

Lapsed donors to recover:

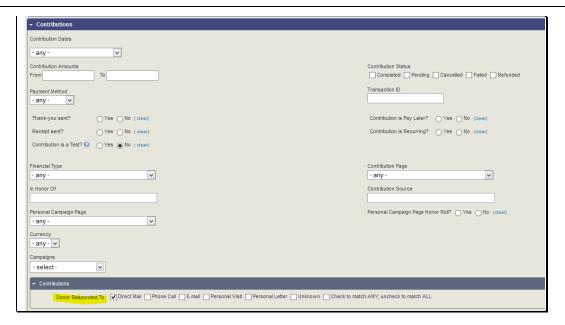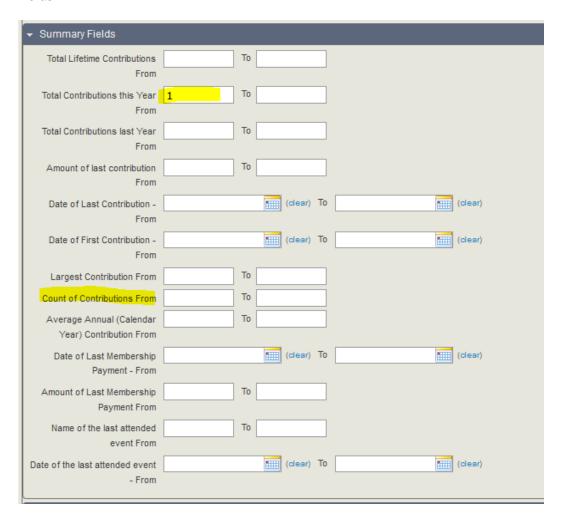FR SYBUNT Group

Search>Advanced Search

Custom Fields

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To find who responded to a specific appeal method:

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This year's donors who could be asked again:

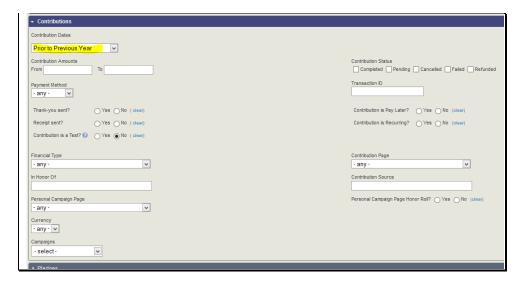**FR Donors this year**
Search>Advanced Search

Custom Fields

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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Search>Search Builder

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