

# How to Filter Using Donor Management

To filter in Donor Management, look for one or more conditions that need to be met, or for groups of conditions that need to be met.

The examples below will walk you through how to create different filters. Please note that all examples included below are examples of filters for *Contacts*. The same basic rules apply to filtering on *Donations*.

## Filtering by One Condition

Filtering is very simple if you are looking for only one condition to be met.

*For example:* I want to find contacts who live in Maryland.

	What I'm Looking For	Condition in Donor Management
Condition 1	Contacts who live in Maryland	State equals Maryland

Condition 1 needs to be met.

In my customer filter, I would enter Condition 1 and click **Search** to find contacts that meet that criterion.

The screenshot shows a 'CREATE A CUSTOM FILTER' interface. At the top left, there is a red 'x' icon. Below it, a red-bordered box contains three dropdown menus: 'State', 'equals', and 'Maryland'. Below this box is another dropdown menu labeled 'all'. To the right of these elements are the links 'Add condition | Add grouping'. At the bottom right, there are two buttons: 'Save' and 'Search Q'.

## Filtering by More than One Condition

Now, let's say you have multiple conditions that need to be met. To filter by multiple conditions, list out your conditions and then specify if **all** of those conditions need to be met or if **any** of those conditions need to be met.

You may want to use filters this way because you are looking for something very specific or you need to narrow down your search results.

Let's start by looking at an example where **all** conditions need to be met.

*Example:* I want to find contacts who live in Maryland AND have given less than \$50 over their lifetime AND who work for Network for Good.

There are three conditions in this example:

	What I'm Looking For	Condition in Donor Management
<b>Condition 1</b>	Contacts who live in Maryland	State equals Maryland
<b>Condition 2</b>	Contacts who have given less than \$50	Total donations less than 50
<b>Condition 3</b>	Contacts who work for Network for Good	Employer equals Network for Good

Condition 1 **AND** Condition 2 **AND** Condition 3 need to be met.

In my custom filter, I would enter Condition 1, click **Add Condition** and enter in Condition 2, and click **Add Condition** and enter Condition 3. Then I would select **all** to indicate that all the conditions that I listed need to be met. Finally, I would click **Search** to find contacts that meet my criteria.

The screenshot shows a 'CREATE A CUSTOM FILTER' interface. It features three rows of conditions, each with a red 'x' icon on the left. The first row is 'State equals Maryland', the second is 'Total donations less than 50', and the third is 'Employer equals Network for Good'. Below these is a dropdown menu set to 'all'. At the bottom right, there are links for 'Add condition' and 'Add grouping', and buttons for 'Save' and 'Search'.

Now let's look at an example where **any** condition needs to be met.

*Example:* I want to find contacts who have EITHER given more than \$500 in the last twelve months OR who have given more than \$250 this year OR who have given more than \$1000 in their lifetime.

There are three conditions in this example:

	What I'm looking for	Condition in Donor Management
<b>Condition 1</b>	Contacts who have given more than \$500 in the last 12 months	Total donations last 12 months greater than 500
<b>Condition 2</b>	Contacts who have given more than \$250 this year	Total donations this year greater than 250
<b>Condition 3</b>	Contacts who have given more than \$1000 in their lifetime	Total donations greater than 1000

Condition 1 **OR** Condition 2 **OR** Condition 3 needs to be met.

In my custom filter, I would enter Condition 1, click “Add Condition” and enter in Condition 2, and click “Add Condition” and enter in Condition 3. Then I would select **any** to indicate that any of the conditions that I listed need to be met. Finally, I would click “Search” to find contacts that meet my criteria.

CREATE A CUSTOM FILTER:

- x
Total donations last 12 mon ▼
greater than ▼
500
- x
Total donations this year ▼
greater than ▼
250
- x
Total donations ▼
greater than ▼
1000

any ▼

[Add condition](#) | [Add grouping](#)

### TIP OF THE DAY:

If I am looking for something **AND** something else I will want to use **ALL**.  
 If I am looking for something **OR** something else I will want to use **ANY**.

Now let's look at an example where you would want to combine conditions using **any** and **all**.

Here you will want to use a grouping.

*Example:* I want to find contacts who have given more than \$50 AND who live in EITHER Maryland OR Indiana.

	What I'm looking for	Condition in Donor Management
<b>Condition 1</b>	Contacts who have given more than \$50	Total donations greater than 50
<b>Condition 2</b>	Contacts who live in Maryland	State equals Maryland
<b>Condition 3</b>	Contacts who live in Indiana	State equals Indiana

In this scenario, Condition 1 needs to be met **AND** one of either Condition 2 **OR** Condition 3 needs to be met. **[Condition 1] AND [either Condition 2 OR Condition 3]** need to be met.

In my custom filter, I would enter in Condition 1. Then I would click **Add grouping**. I would then enter in Condition 2, click **Add condition**, and then enter in Condition 3. In the grouping that I just created, I would select **any** to indicate that any one of the conditions in the group needs to be met. For my first condition and my grouping, I would select **all** to indicate that both my first condition AND something in my second condition need to be met.

The screenshot shows a 'CREATE A CUSTOM FILTER' interface. It features a list of filter conditions and a grouping structure. The first condition is 'Total donations' with the operator 'greater than' and the value '50'. Below this, a grouping is defined with the operator 'any'. Inside this grouping, two conditions are listed: 'State equals Maryland' and 'State equals Indiana'. At the bottom of the interface, there is a dropdown menu set to 'all', and buttons for 'Save' and 'Search'.