

# Leveraging Your Data via Filters

# Agenda

Smart Segmentation

Filter Outcomes

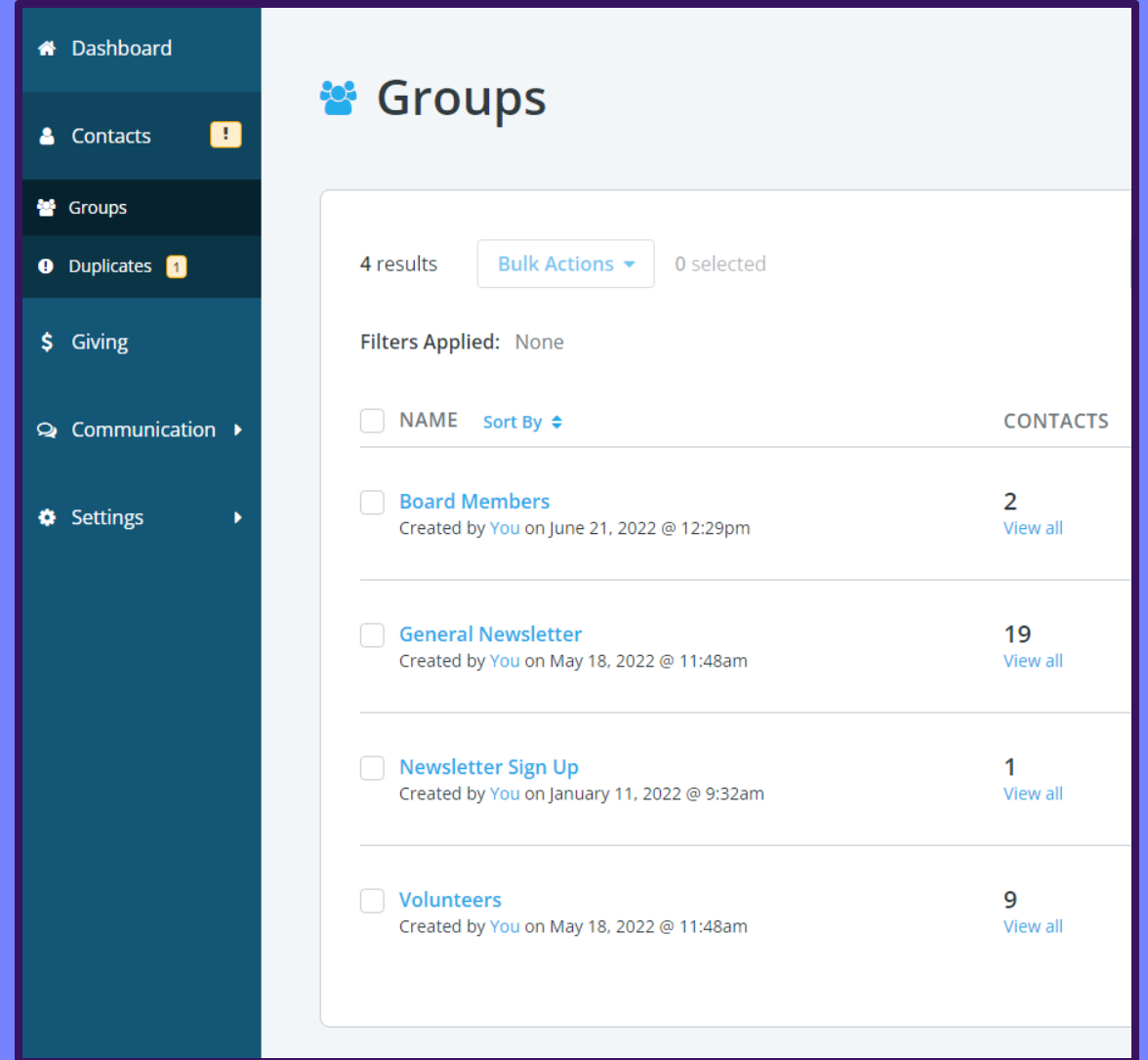
How to Build Filters

Simple and Advanced Examples

# Smart Segmentation

# Groups

- Located in the **Contacts** tab
- Great way to segment contacts based on unique identifiers
- Works best for information not naturally in the software, e.g. Board Members and Volunteers
- Perfect for email lists
- You don't need **Groups** related to donation information. **Filters** will do that for you!
- Manually updated by you when there are changes



The screenshot displays the 'Groups' section of the Bonterra software. A dark teal sidebar on the left contains navigation options: Dashboard, Contacts (with a notification icon), Groups (highlighted), Duplicates (with a notification icon), Giving, Communication, and Settings. The main content area is titled 'Groups' and shows 4 results. At the top right, there is a 'Bulk Actions' dropdown menu and '0 selected' text. Below this, it states 'Filters Applied: None'. A table lists the groups with columns for 'NAME' and 'CONTACTS'. Each row includes a checkbox, the group name, a 'Sort By' dropdown, the creation date and time, and a 'View all' link.

<input type="checkbox"/>	NAME	Sort By	CONTACTS
<input type="checkbox"/>	Board Members		2
	Created by You on June 21, 2022 @ 12:29pm		<a href="#">View all</a>
<input type="checkbox"/>	General Newsletter		19
	Created by You on May 18, 2022 @ 11:48am		<a href="#">View all</a>
<input type="checkbox"/>	Newsletter Sign Up		1
	Created by You on January 11, 2022 @ 9:32am		<a href="#">View all</a>
<input type="checkbox"/>	Volunteers		9
	Created by You on May 18, 2022 @ 11:48am		<a href="#">View all</a>

# Custom Fields

Do you capture additional information on your contacts that you want represented in your Donor Management System?

- **Custom Fields** can live on any contact or donation record
- You can use Custom Fields to create **Filters** and narrow down your contacts for a specific list or report
- Some examples of Custom Fields:
  - Alumni year
  - Shirt size
  - Volunteer Type

The screenshot displays the Bonterra Donor Management System interface. On the left is a dark teal sidebar with navigation options: Dashboard, Contacts (with a notification icon), Giving, Communication, Settings, Your Organization, Admins, Custom Fields (highlighted), Imports, Exports, and Start Self-Provision. The main content area is titled 'Custom Fields Contacts' and has two tabs: 'Contact Custom Fields' (selected) and 'Donation Custom Fields'. Below the tabs, there are controls for 'Filters' (showing 3 results) and 'Bulk Actions' (showing 0 selected). A 'Filters Applied' section shows 'Status Active' with a close button. Below this, a list of custom fields is shown, each with a checkbox and a type indicator: 'NAME' (checkbox), 'Newsletter' (checkbox, Type: Checkboxes), 'Programs' (checkbox, Type: Checkboxes), and 'Alumni Year' (checkbox, Type: Textbox).

# Filters

- Located in both **Contacts** and **Giving** tabs
- Segment contacts into lists or analyze giving trends using any contact or donation information
- Can be saved to pull anytime and updates automatically
- Any saved filters can be accessed when determining the audience of a communication
- Create filters pulling in **Groups** and **Custom Fields**
- Export filtering results to a .csv file (spreadsheet)

This screenshot shows the 'Select a Recommended Filter' section of the software. At the top, there are three tabs: 'Recommended Filters' with a count of 12, 'Saved Filters' with a count of 1, and a 'Create Filter +' button. To the right is a search bar labeled 'Search by name, phone or e' with a magnifying glass icon. Below the tabs, a grid of filter options is displayed, each with a right-pointing arrow:

- Donated Last Year But Not Yet This Calendar Year (LYBUNT)
- Donated Some Year But Not Yet This Calendar Year (SYBUNT)
- Donations This Calendar Year Greater Or Equal To \$500
- New Donors Last 30 Days
- With Donations
- Without Donations
- With an Email Address
- Without an Email Address
- Made donation last calendar year
- Donors at risk of lapsing next 30 days
- Renewed donors this calendar year
- Renewed donors last calendar year

This screenshot shows the 'Create a Custom Filter' interface. It features the same top navigation as the previous screenshot. The main area contains a form for building a filter:

- A red 'x' icon to remove the condition.
- A dropdown menu with 'Contact type' selected.
- A dropdown menu with 'equals' selected.
- An empty text input field.
- A dropdown menu with 'all' selected.
- Buttons for 'Add Condition' and 'Add Grouping'.
- 'Save Filter' and 'Search' buttons at the bottom right.

# Filter Outcomes

# Filtering in Contacts vs. Giving

<b>FAQ</b>	<b>Contacts</b>	<b>Giving</b>
<b>What do you want to see?</b>	People	Donations
<b>What are some examples?</b>	2024 donors, people who donated to a campaign	2024 donations, donations from a campaign
<b>What bulk actions are available?</b>	Sending communications, Add to Group, Export, Flag for duplicates, Mark as deceased	Acknowledged, Export
<b>Can they be used in Communications?</b>	Yes, in Bulk Actions and starting from the communication if saved	Yes, if saved and starting from the communication



# Additional Resources

# Additional Learning Opportunities

Other webinars available in Bonterra Academy (live and recorded)

## 1. Foundational Webinars

Tailored to help you accomplish major tasks in Network for Good.

## 2. Advanced Webinars

Unlock the more advanced functionalities for skilled users.

## 3. Coaching Webinars

Provide best-practice advice to maximize fundraising and engagement efforts for nonprofits.

## 4. New Product Release Webinars

Deep dive into newly released features!

## 5. Ask the Experts Q&A Webinars

Connect directly with Bonterra experts and get answers to your questions!



Build confidence and knowledge in our software.

<https://bonterratech.com/training#network-for-good>

# Contacting the Customer Support Team | 8am – 7pm ET

## Chat



- In-app messenger support for quick, technical questions
- Blue dot in bottom right corner of system
- Expect a reply in 2-3 hours



## Email



- [success@networkforgood.com](mailto:success@networkforgood.com)
- Dedicated team to resolve product problems and questions
- Expect a reply in 2-3 business days

## But first!



You can access **View Guides and Help Articles** in the Help tab in your software to find a comprehensive library of articles, guides, walkthroughs, and videos.

# Q & A

- Ask questions about functionality covered in this training
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.