Leveraging Your Data via Filters

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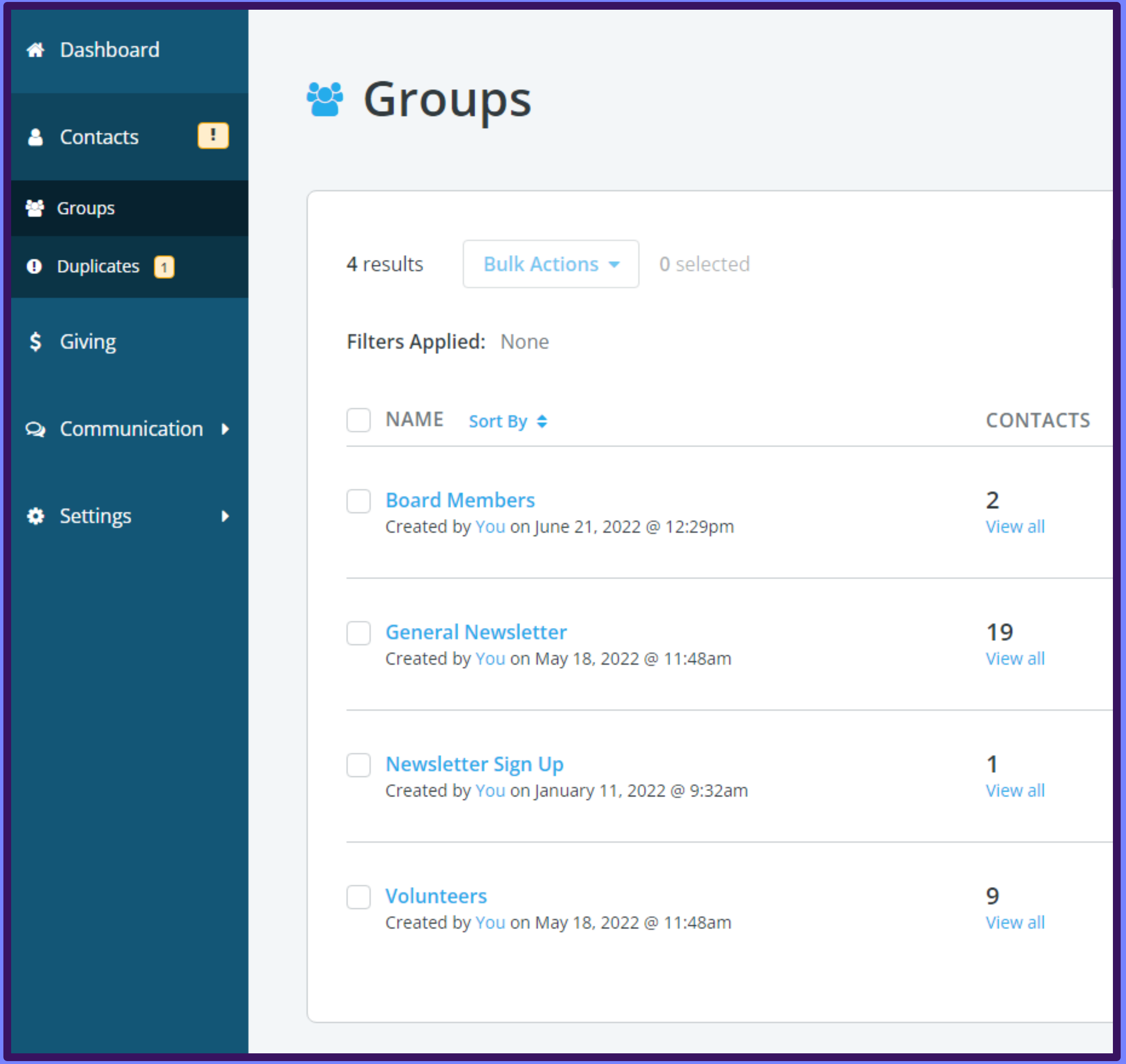
Agenda

- Smart Segmentation
- Filter Outcomes
- How to Build Filters
- Simple and Advanced Examples

Smart Segmentation

Groups

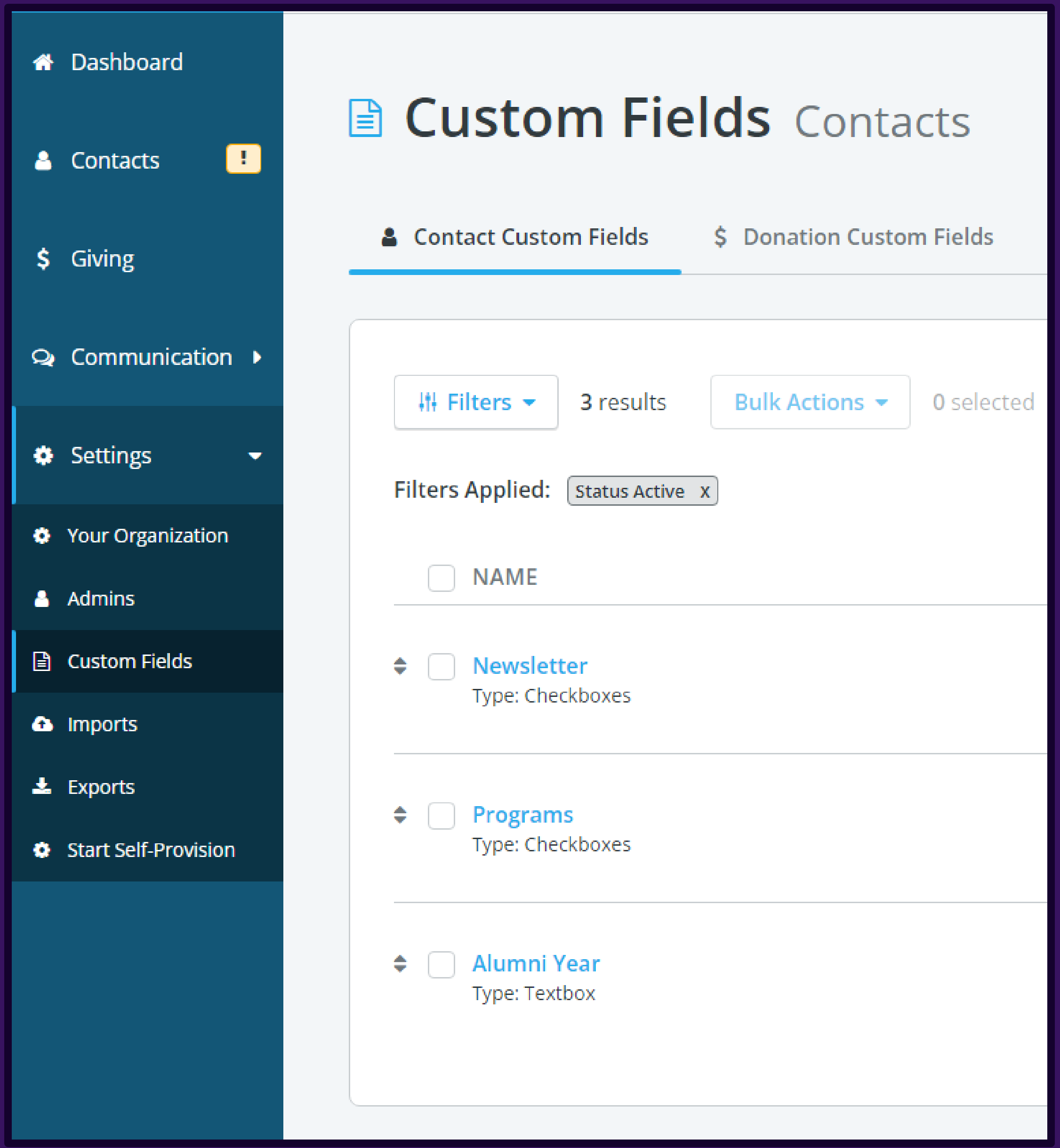
- Located in the **Contacts** tab
- Great way to segment contacts based on unique identifiers
- Works best for information not naturally in the software, e.g. Board Members and Volunteers
- Perfect for email lists
- You don't need **Groups** related to donation information. **Filters** will do that for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



Custom Fields

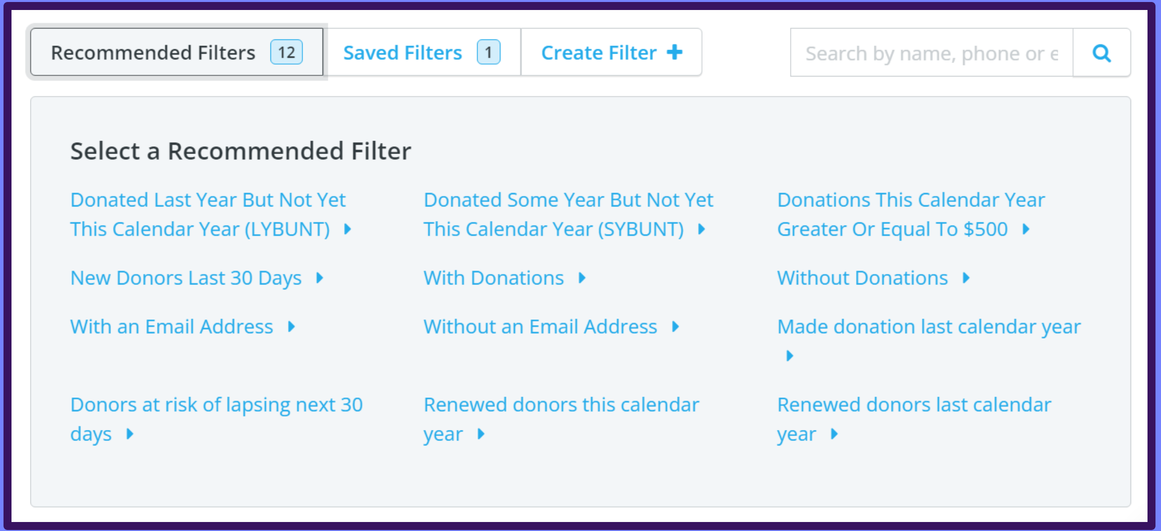
Do you capture additional information on your contacts that you want represented in your Donor Management System?

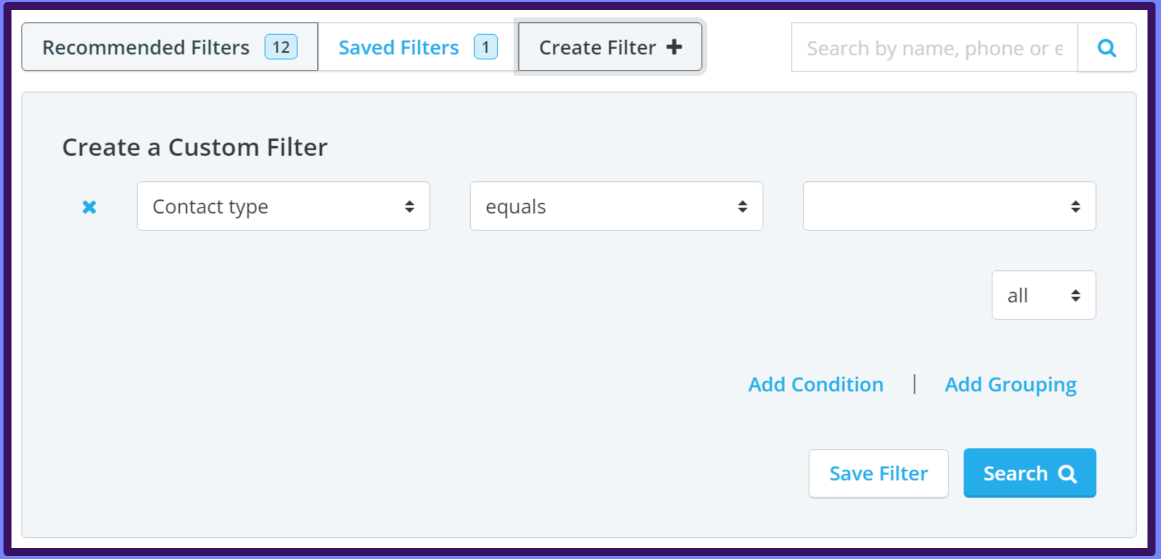
- **Custom Fields** can live on any contact or donation record
- You can use Custom Fields to create **Filters** and narrow down your contacts for a specific list or report
- Some examples of Custom Fields:
  - Alumni year
  - Shirt size
  - Volunteer Type



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)





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Filter Outcomes

Filtering in Contacts vs. Giving

FAQ	Contacts	Giving
What do you want to see?	People	Donations
What are some examples?	2024 donors, people who donated to a campaign	2024 donations, donations from a campaign
What bulk actions are available?	Sending communications, Add to Group, Export, Flag for duplicates, Mark as deceased	Acknowledged, Export
Can they be used in Communications?	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
- 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.

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