

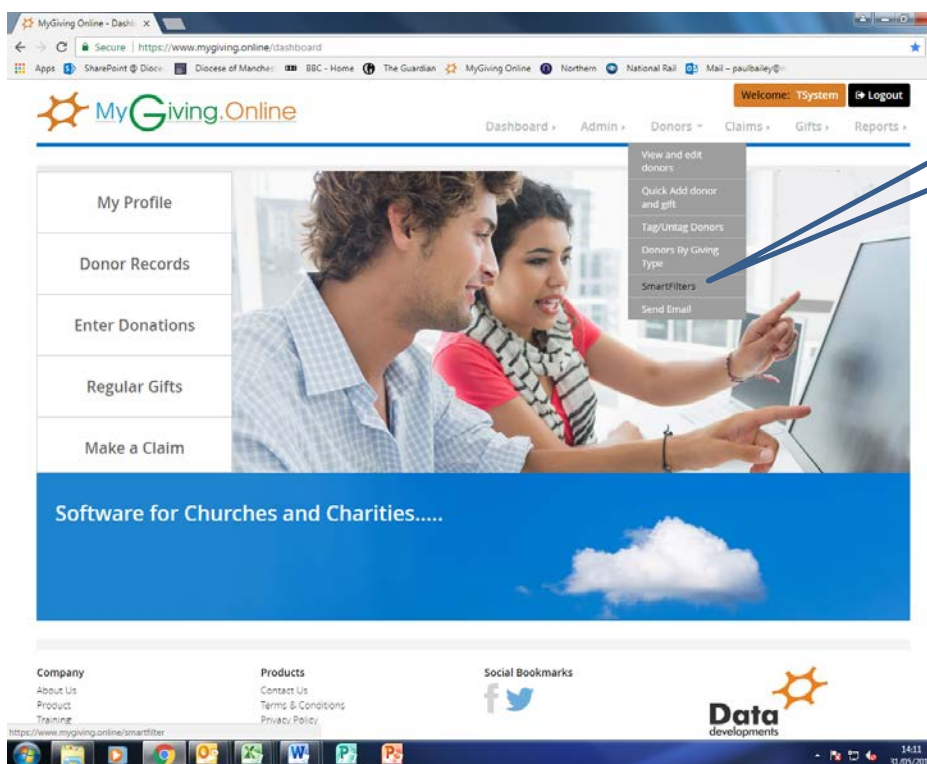
GAL 16 – Setting up your SmartFilters

Once you have set up your SmartFilters you'll be able to ask questions of My Giving Online as often or as little as you require. The advantage is you can save your Giving questions to use again in the future, but the answers will always be current and up to date.

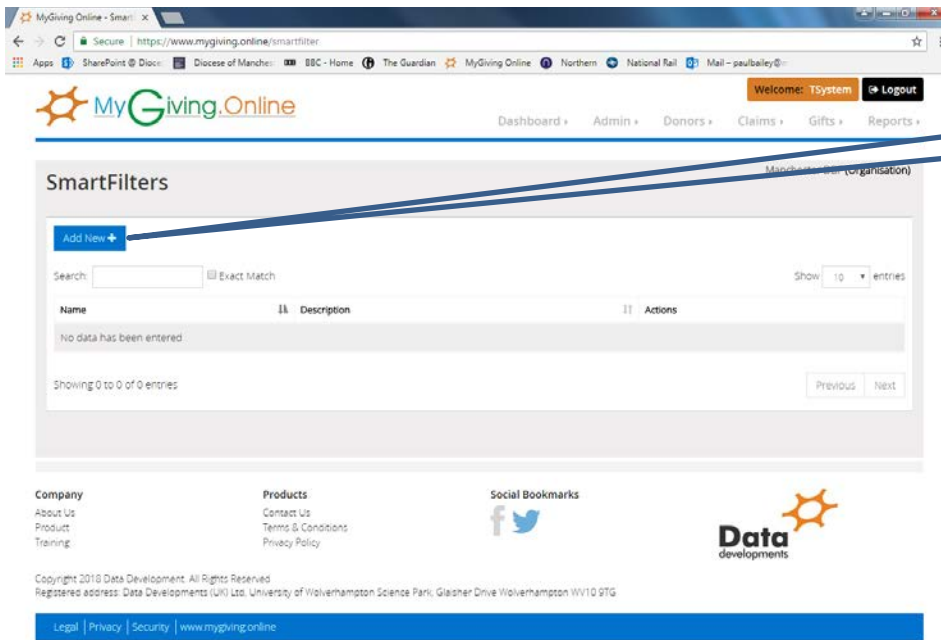
SmartFilters can either be run on their own to provide the results you need, or they are available as options in areas such as Reports to narrow down the results produced.

You can set up as many SmartFilters as you'd like, and the following step-by-step guide will show you how to do this.

- Step 1



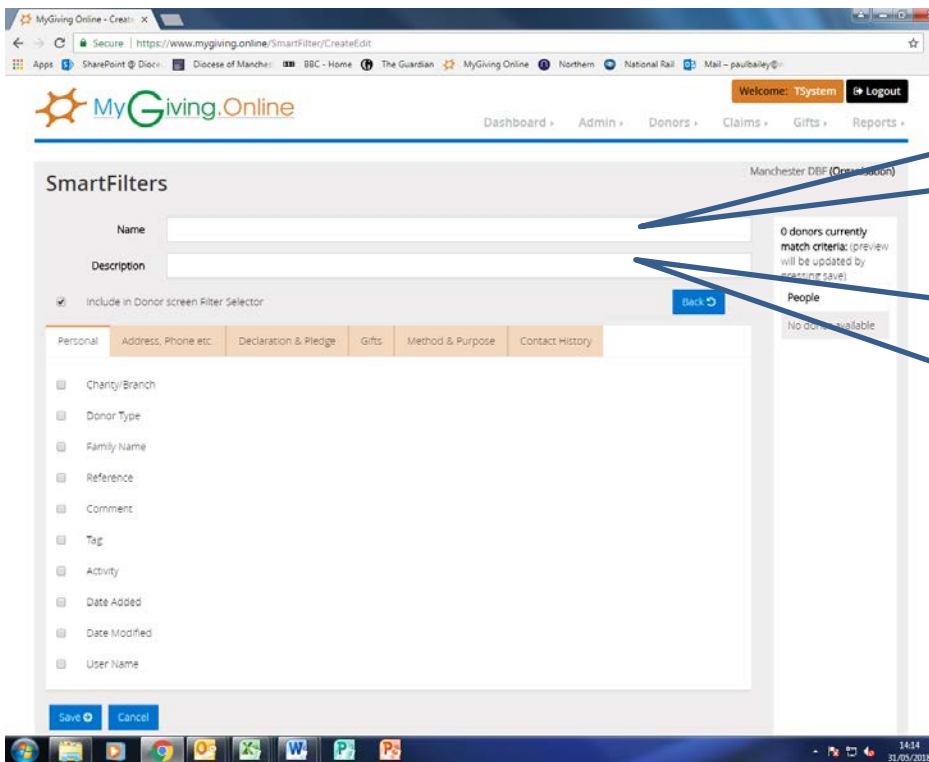
- Step 2



Click on Add New.



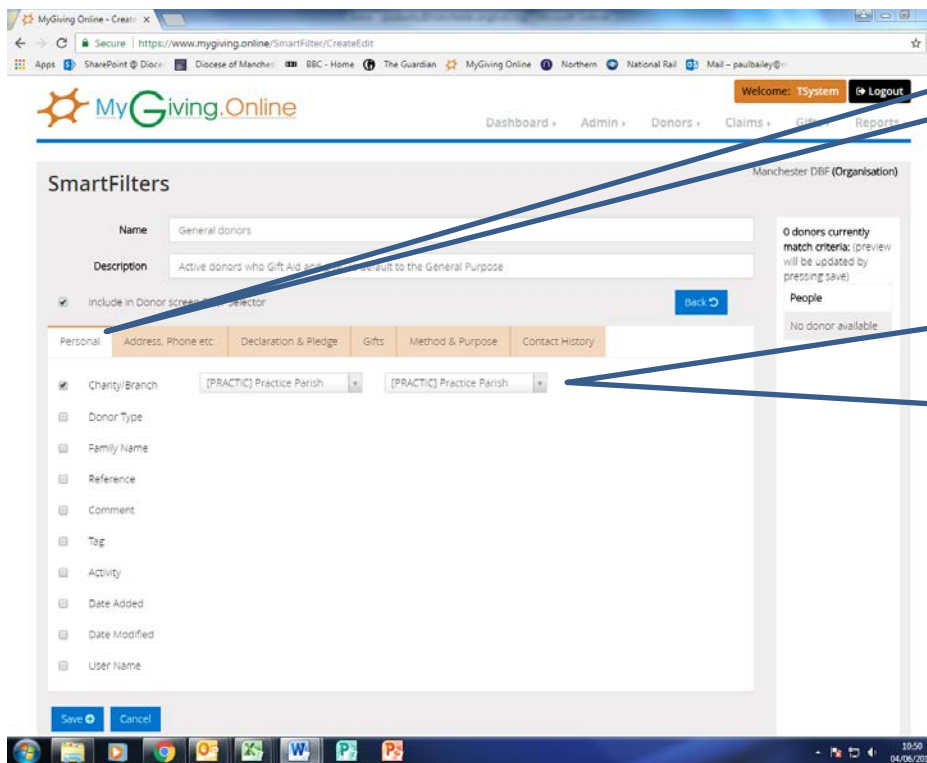
- Step 3



In the name field type in - General Donors.

In the description field type in - Active donors who Gift Aid and give via default to the General Purpose.

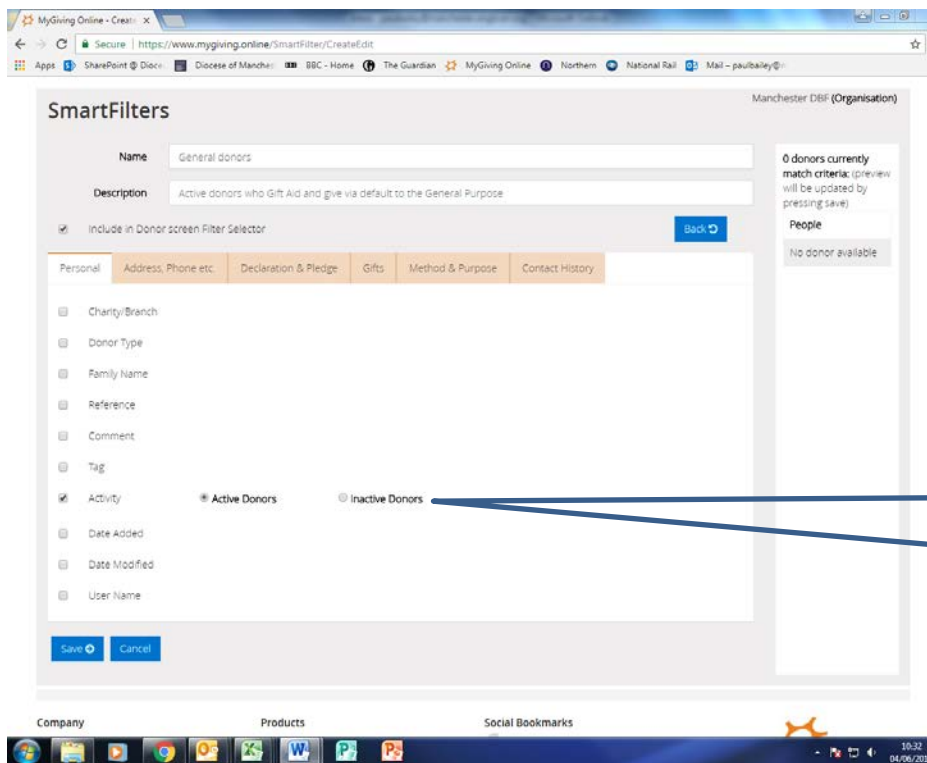
- Step 4



Click on the Personal tab.

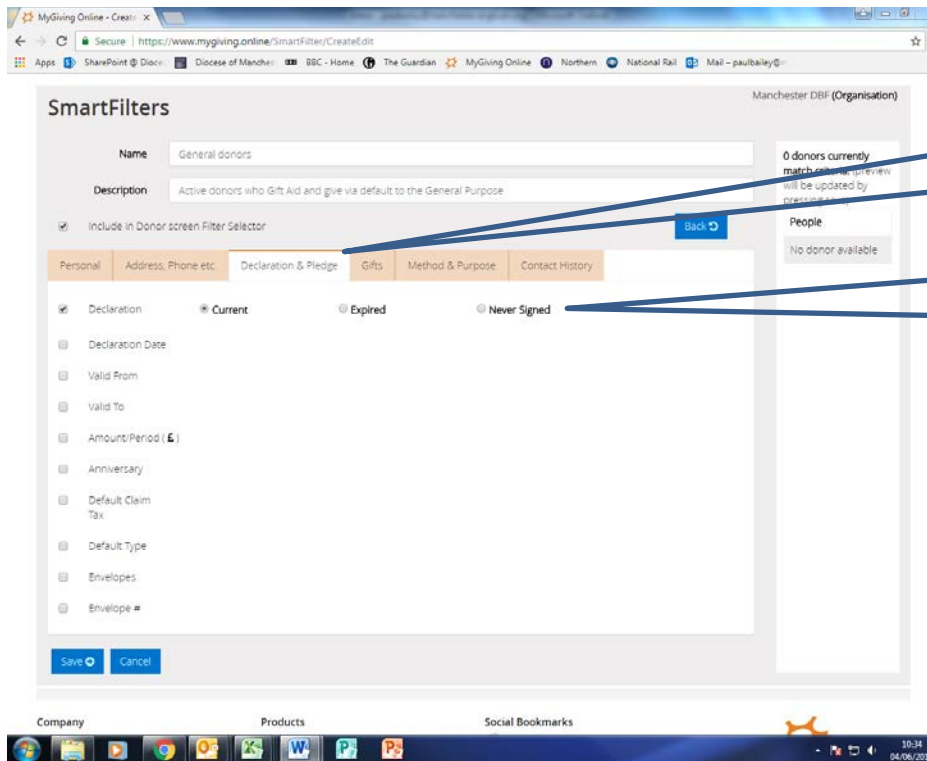
Click on the Charity/Branch tick box. From the drop down lists, ensure the correct Charity and Branch has been selected.

- Step 5

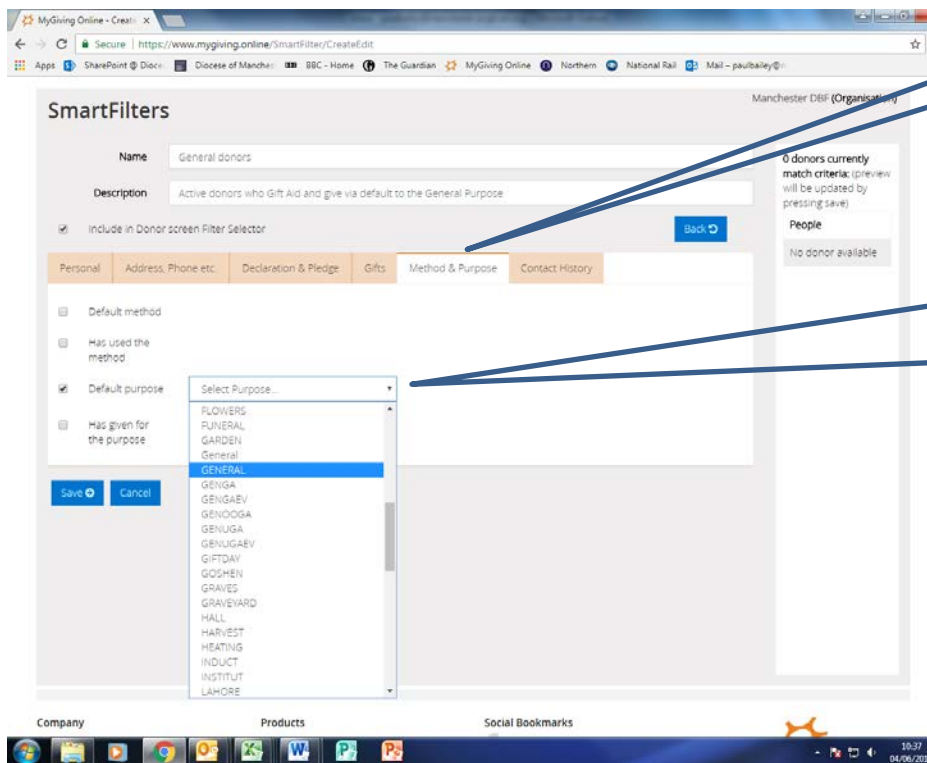


Click on the tick box for Activity and choose Active Donors.

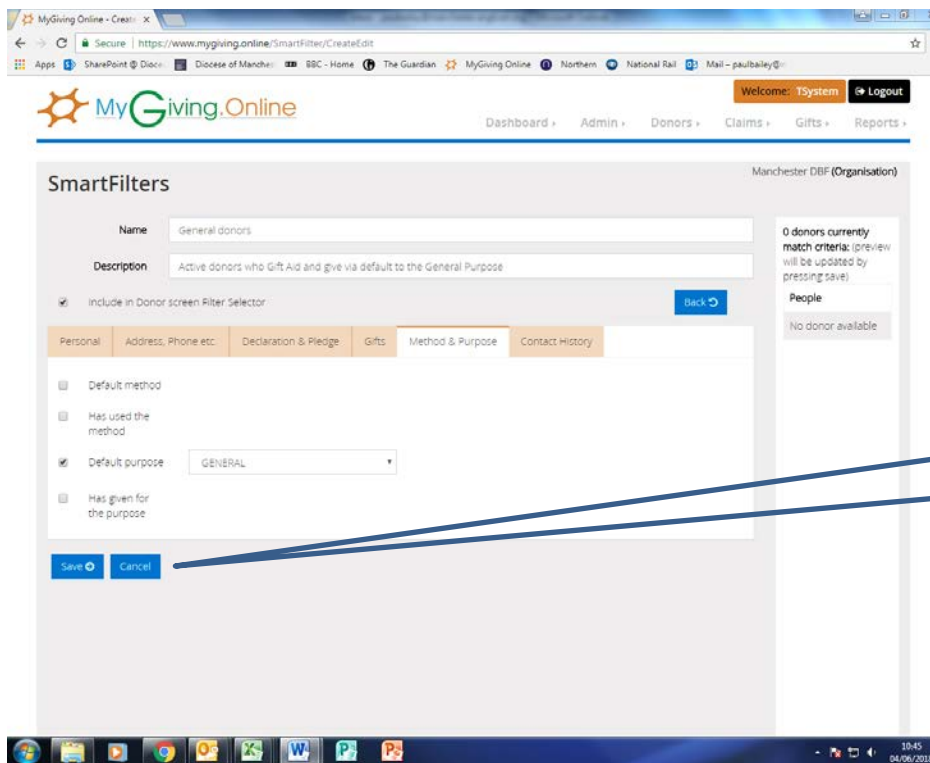
- Step 6



- Step 7

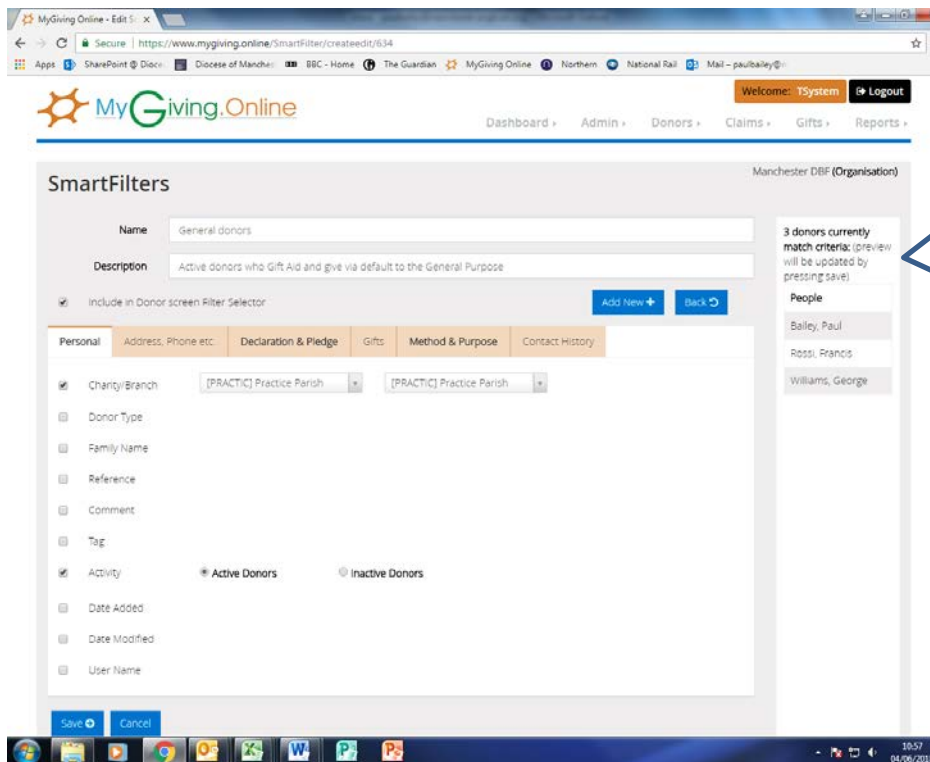


- Step 8



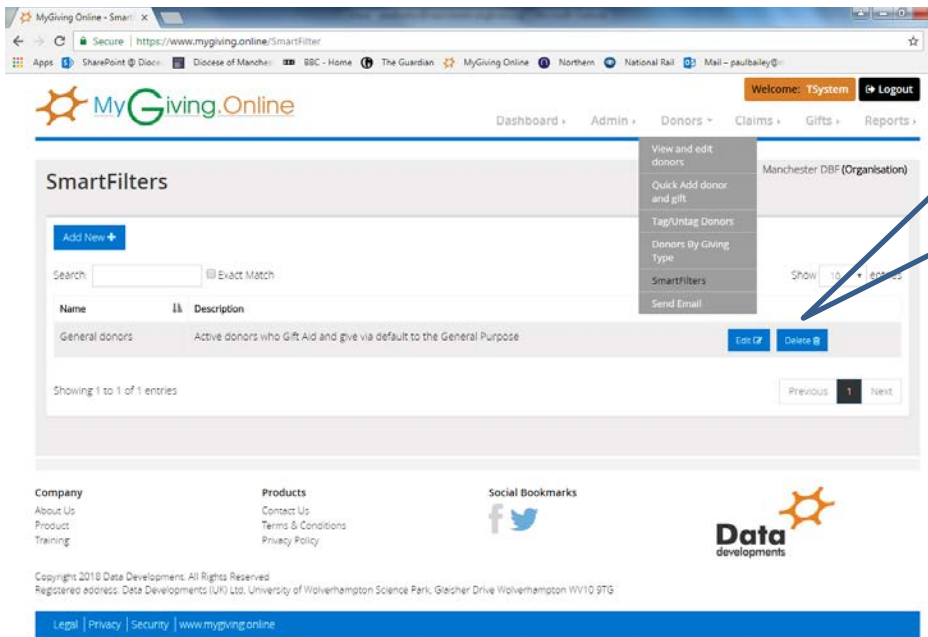
Click on Save to store your SmartFilter.

- Step 9



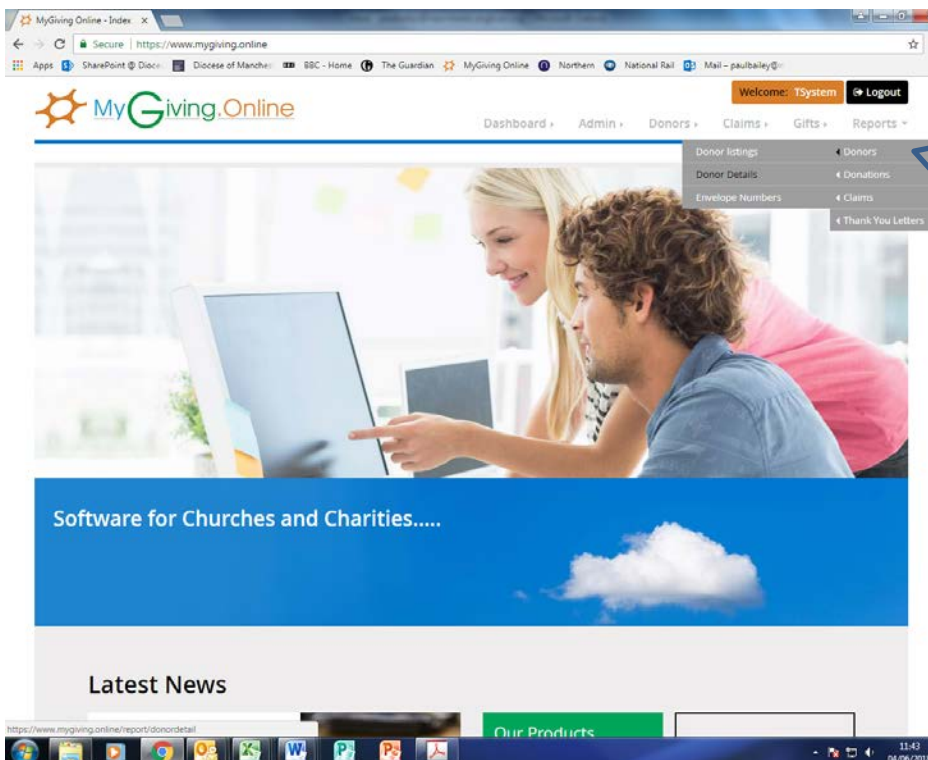
On the right hand side of the screen you will see a list of the donors who match the criteria of your Smart Filter.

- Step 10



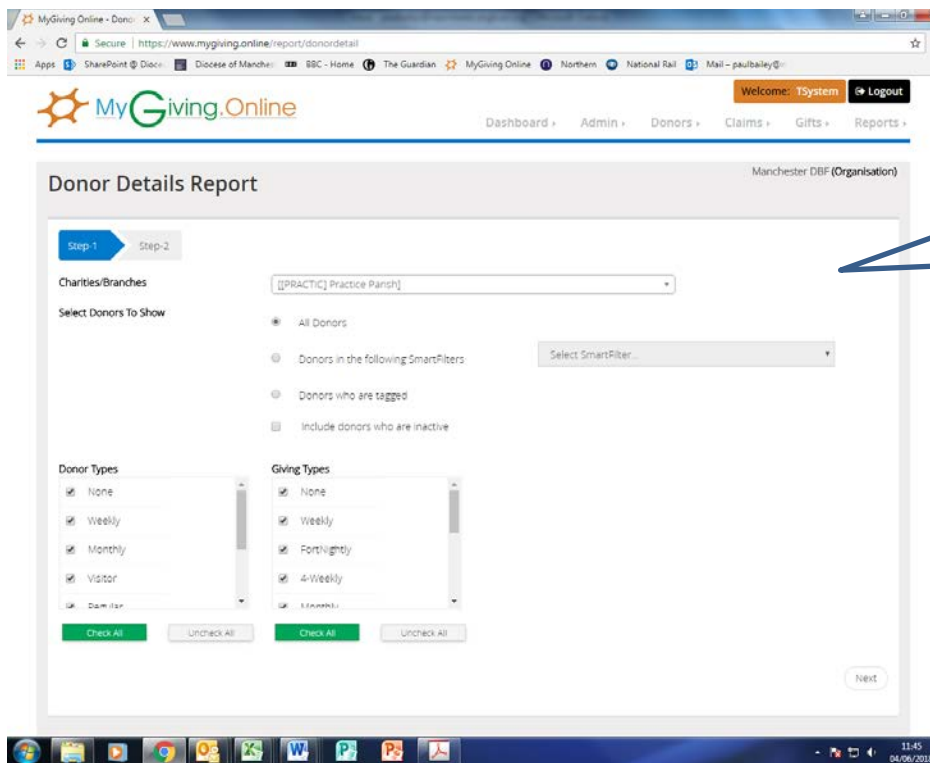
You can see your list of SmartFilters, and Edit or Delete them, by opening the SmartFilters screen.

- Step 11



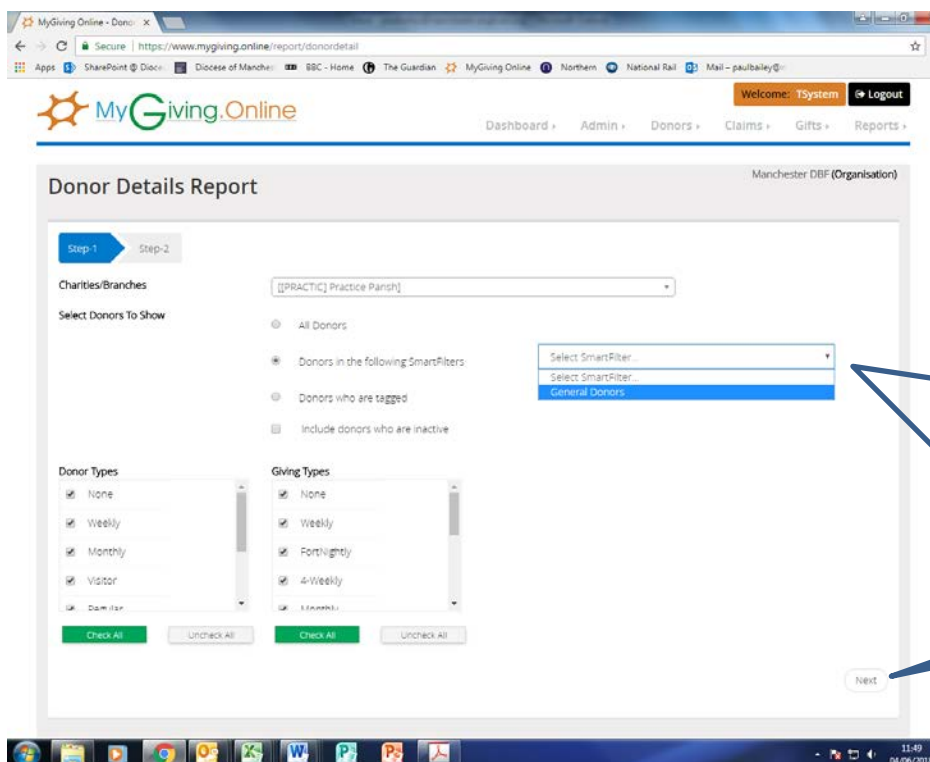
To see your SmartFilter in action, click on Reports, Donors and Donor Details.

- Step 12



This window will appear on your screen.

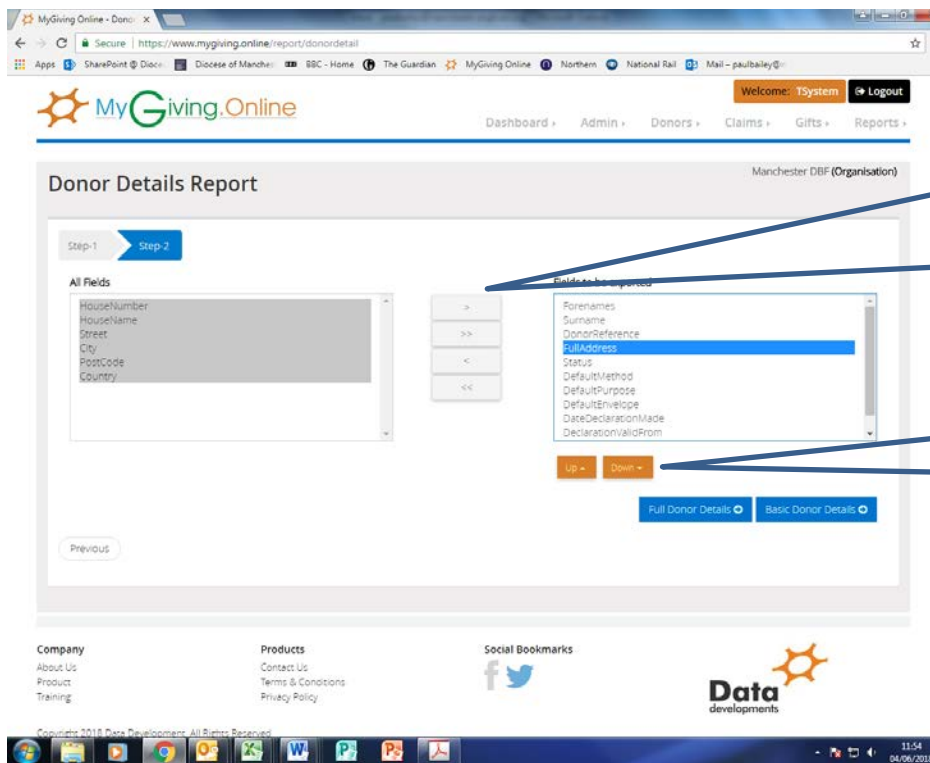
- Step 13



Click on the tick box for Donors in the following SmartFilters. From the Select SmartFilter drop down list, choose General Donors.

Click on Next.

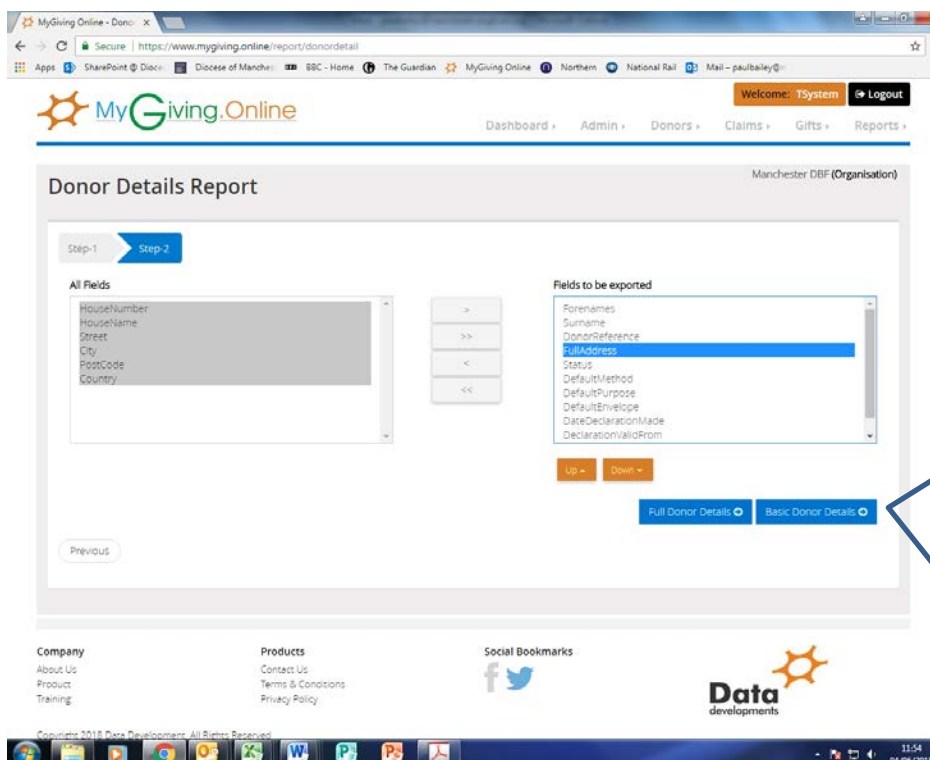
- Step 14



From the All Fields list choose the ones you need, click the arrow to move them across to the Fields to be exported list.

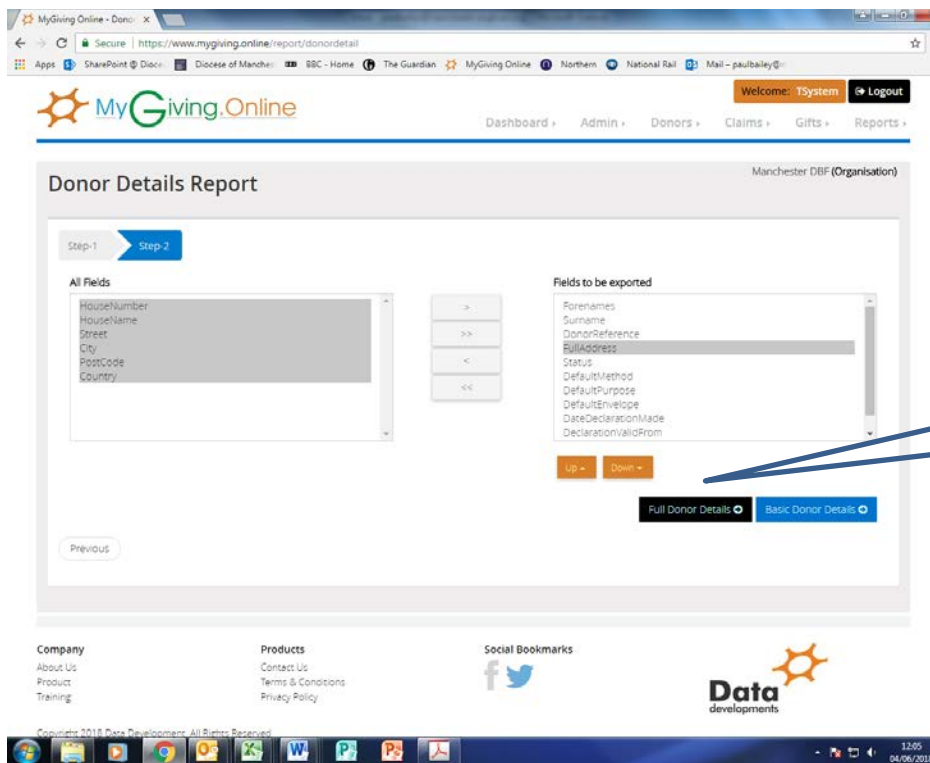
If you wish, the fields can be reordered.

- Step 15

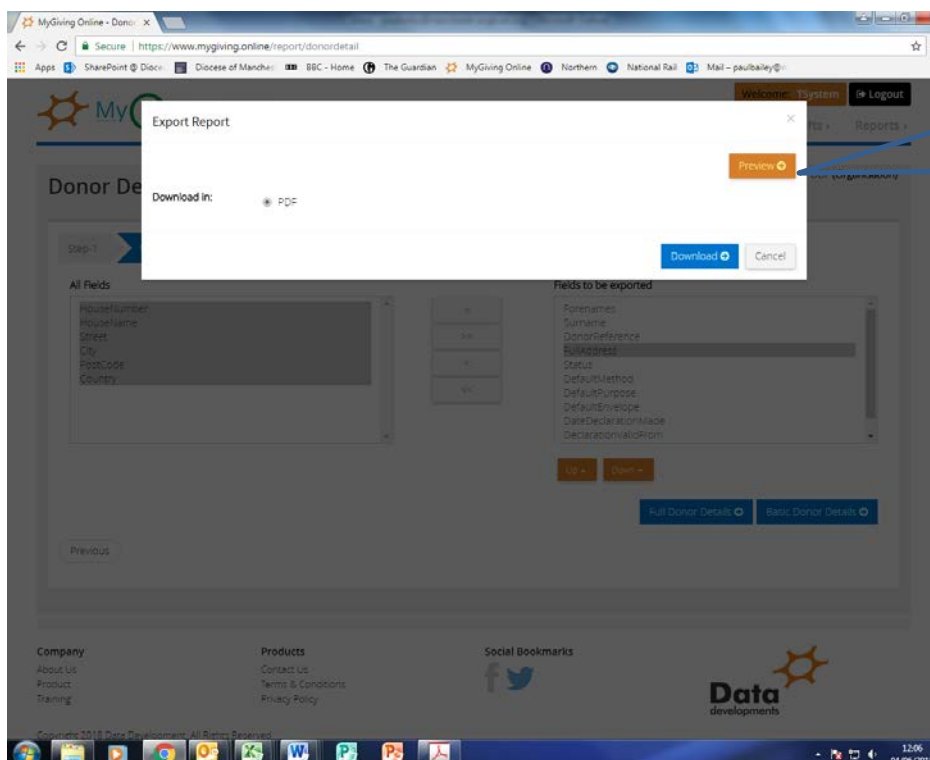


There are two options available to produce a report. Full Donor Details provides a list of the donor's details on a separate page of A4 paper. Basic Donor Details produces a table showing your donors. See below for examples.

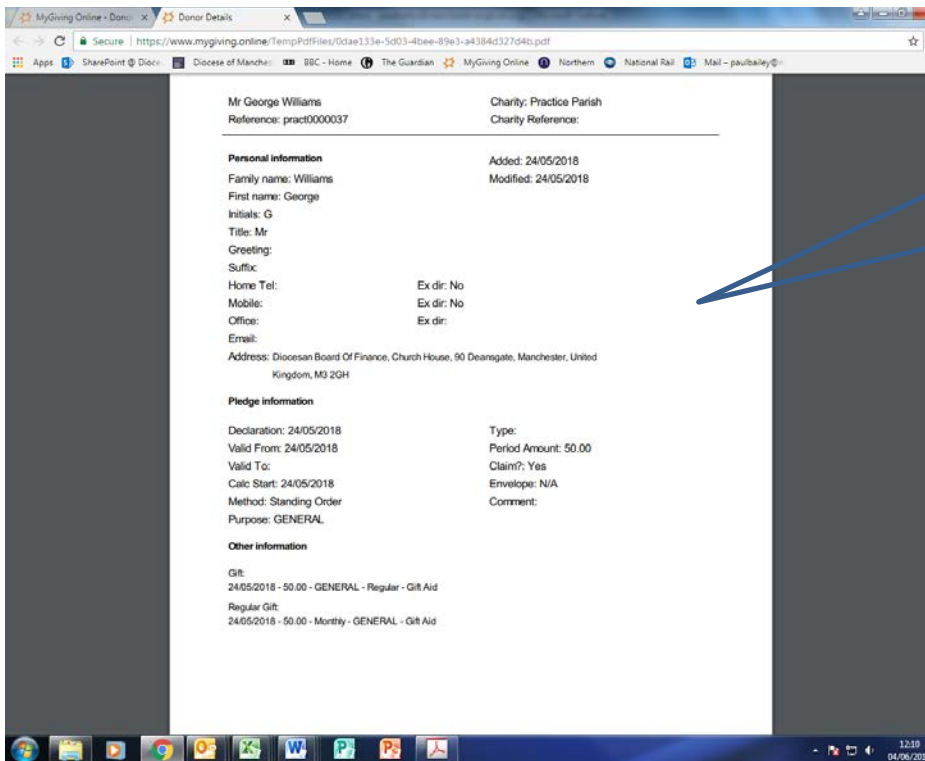
- Step 16



- Step 17

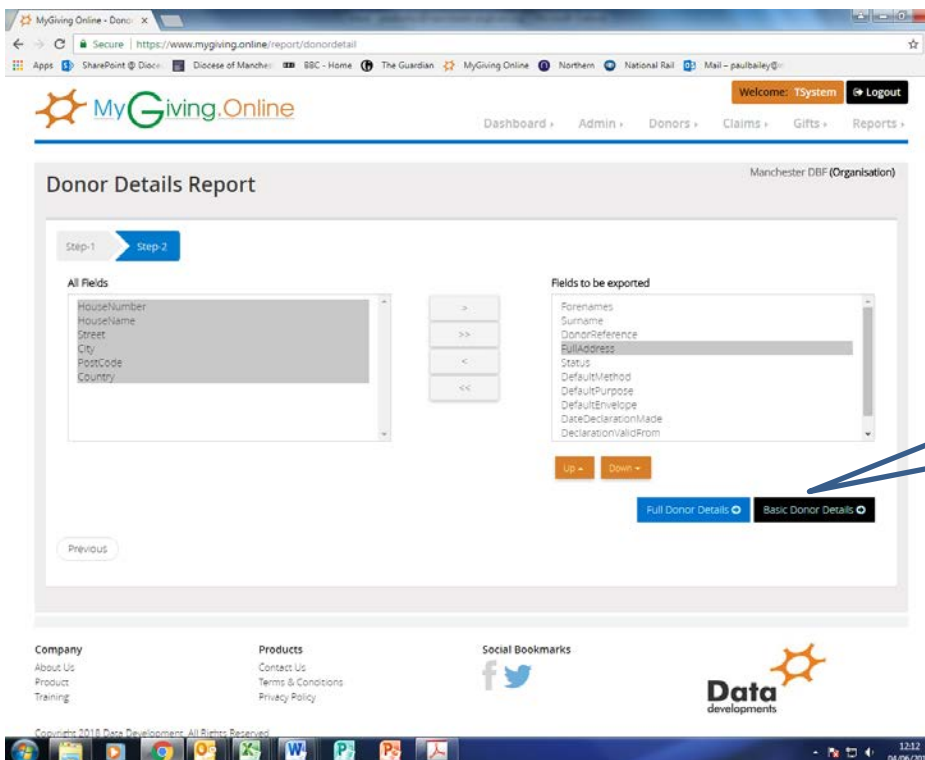


- Step 18



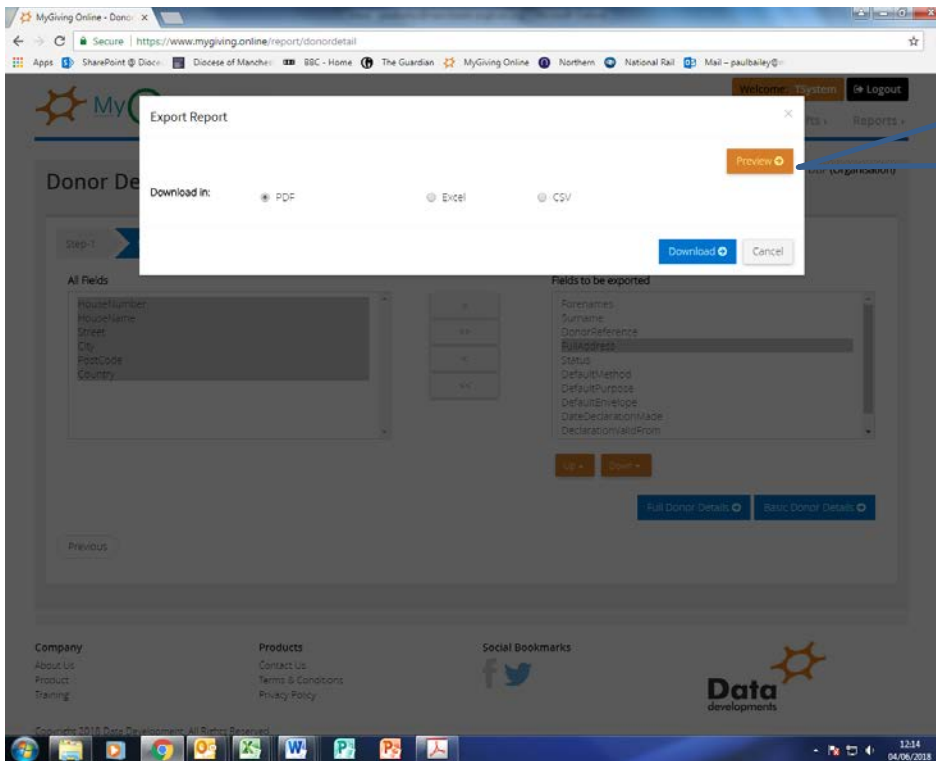
The report will appear in a new tab in your browser. You can print out a copy from here.

- Step 19



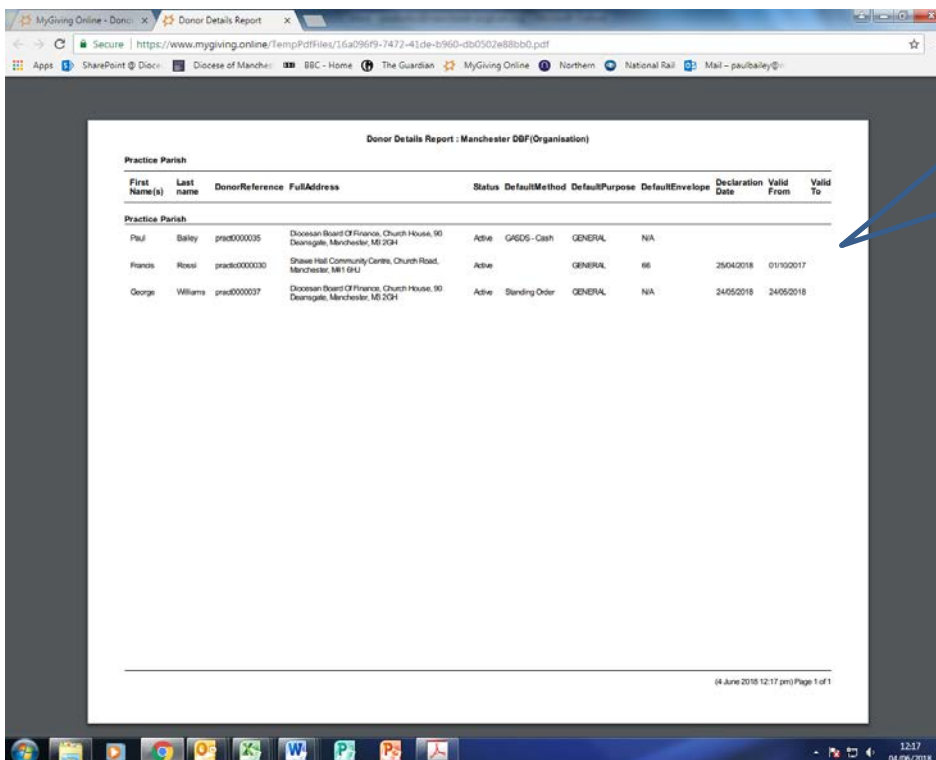
Click on Basic Donor Details.

- Step 20



This pop up will appear on your screen. Click on PDF and Preview.

- Step 21



The report will appear in a new tab in your browser. You can print out a copy from here.