

Using Filters in DPO

Holly Guncheon of Herzl Camp wanted to prepare a list of all donors who have given to Herzl for the first time during the current Fiscal Year. She could use one of the many Standard Pledge and Gift reports in her donor database (DPO) to find the information she needed, with a little extra sorting in Excel. However, she noted that this is a report she will be running frequently and wondered if there was a better way to filter her results.

Her solution? A filter. Filters are simply tools that restrict the data that is shown in a report or spreadsheet. For example, you may have a report that shows all donations for the current Annual Campaign. A filter could be applied to that report to only display online gifts for that Campaign. Most donor databases should offer some sort of filter functionality. Even Excel has filters. Please let us know if you need any help using filters in your database.

In DPO, you can create custom filters on any field(s). In addition, there are Standard Filters that already exist. For example, the "New Donors this Month" and "New Donors this (Calendar) Year" filters show only those constituents who gave for the first time over the specific time period. These filters use the INITIAL_GIFT_DATE field, which stores the date of the first gift entered into DPO for each donor.

Holly wanted a similar filter that would only give her gifts from the current *Fiscal Year*. To do so in DPO, she opened the Filter selection screen by selecting Utilities --> Filters. Holly selected "Set Selection Filter" and clicked on "Build New Filter." Next, she selected **Main/Bio -->INITIAL_GIFT_DATE --> Between --> <the first day of the current Fiscal year> --> <the last day of the current Fiscal Year>**. She saved the filter and selected "Share across all Users" so that all Herzl Camp staff can use the filter for their reporting.

Now Holly has a filter she can use to report only on those donors who have given to Herzl for the first time this Fiscal Year. She will need to create a new Filter for next Fiscal Year, following the same steps.

Note that Holly also discovered that you can create a Filter that will automatically compute today's date. For example, if you wanted to report on all gifts given today, you can create a new filter that uses "Exactly Equal to" TODAY (instead of Between). If you would like help creating a filter with this type of automated computation, please let us know.

Have you found any other great uses of Filters in DPO (or another donor database)? Have you learned any lessons along the way? Let us know! We are sure that others can learn from your experiences.