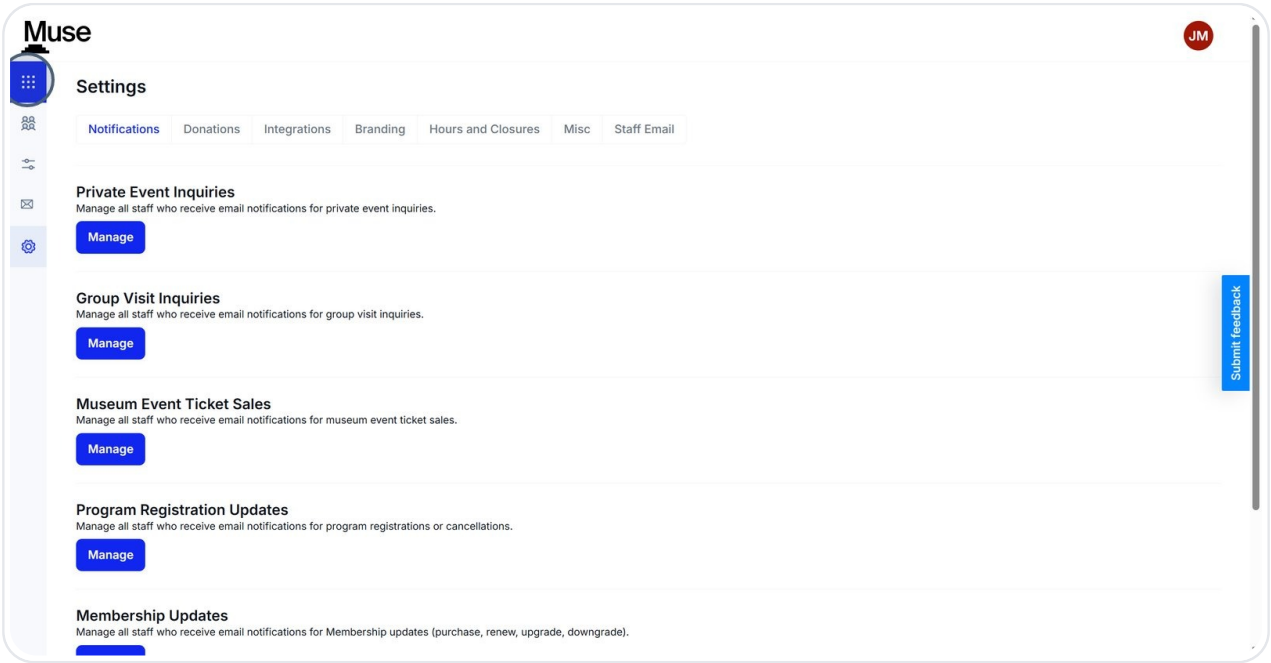


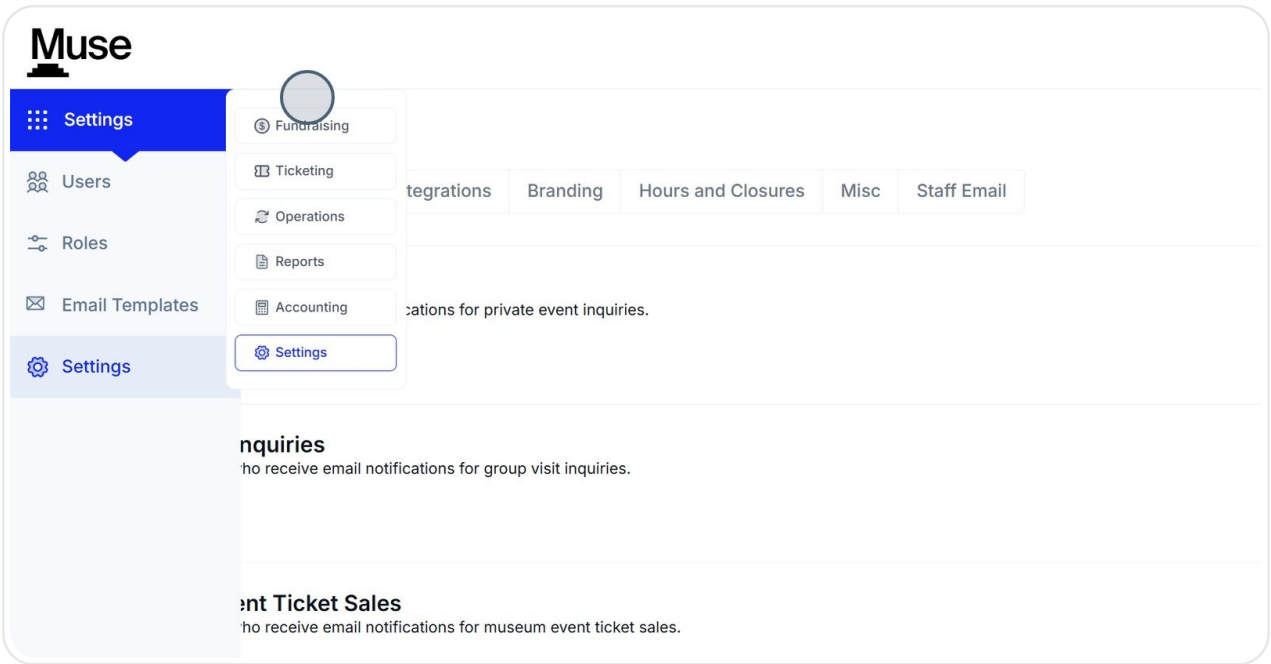


# Create a Filtered Constituent List

1. Click the blue North Star icon.



2. Click "Fundraising"



### 3. Click "Constituents" in the navigation menu.

The screenshot shows the Muse Fundraising Dashboard. The navigation menu on the left has "Constituents" highlighted with a red circle. The main content area displays a table of constituents with columns: First Name, Last Name, Campaign, Commitment Type, Payment Type, Frequency, and Amount. Below the table, there are two progress bars: "2026 Capital Campaign" at 27.05% and "2026 Capital Campaign" at 0.58%.

| First Name | Last Name | Campaign              | Commitment Type | Payment Type | Frequency | Amount   |
|------------|-----------|-----------------------|-----------------|--------------|-----------|----------|
| John       | Benton    | 2026 Capital Campaign | Active          | Money        | One-time  | \$150.00 |
| Will       | B         | 2026 Capital Campaign | Active          | Money        | One-time  | \$100.00 |
| Megan      | Gill      | General Fund          | Never Member    | Money        | One-time  | \$100.00 |
| Josh       | Test      | 2026 Capital Campaign | Never Member    | Money        | One-time  | \$75.00  |
| Amanda     | Fraser    | General Fund          | Never Member    | Money        | One-time  | \$5.00   |
| Jane       | Adams     | 2026 Capital Campaign | Active          | Money        | One-time  | \$75.00  |
| Mary       | Johnson   | General Fund          | Never Member    | Money        | One-time  | \$5.00   |
| Mary       | Johnson   | General Fund          | Never Member    | Money        | One-time  | \$5.00   |
| Oliver     | Gunderson | General Fund          | Active          | Money        | One-time  | \$5.00   |
| Phyllis    | Gunderson | General Fund          | Active          | Money        | One-time  | \$5.00   |
| John       | Smoltz    | General Fund          | Active          | Money        | One-time  | \$5.00   |
| Jules      | Adams     | General Fund          | Active          | Money        | One-time  | \$5.00   |

### 4. Select Filter to customize your search.

The screenshot shows the Muse Fundraising Dashboard with the "Filter" button highlighted in the search bar. The main content area displays a table of individuals with columns: First Name, Last Name, Membership Status, Location, Last Activity, and Fiscal Year Value.

| First Name | Last Name | Membership Status | Location          | Last Activity | Fiscal Year Value |
|------------|-----------|-------------------|-------------------|---------------|-------------------|
| John       | Benton    | Active            | --                | --            | \$0.00            |
| Will       | B         | Active            | --                | --            | \$0.00            |
| Megan      | Gill      | Never Member      | Tillamook, OR     | 7/16/26       | \$5.00            |
| Josh       | Test      | Never Member      | --                | 7/15/26       | \$79.50           |
| Amanda     | Fraser    | Never Member      | --                | 7/27/26       | \$50.00           |
| Jane       | Adams     | Active            | --                | --            | \$0.00            |
| Mary       | Johnson   | Never Member      | --                | 7/09/26       | \$0.00            |
| Mary       | Johnson   | Never Member      | --                | 7/08/26       | \$0.00            |
| Oliver     | Gunderson | Active            | --                | --            | \$0.00            |
| Phyllis    | Gunderson | Active            | San Francisco, CA | 7/07/26       | \$313.60          |
| John       | Smoltz    | Active            | --                | --            | \$0.00            |
| Jules      | Adams     | Active            | --                | --            | \$0.00            |

5. Use Filter Category to focus on constituent attributes.

Individuals

Organizations

All

Q

Search by name

Filters

Add a criterion

Filter Category

+

Save search

View saved searches

☐

First Name

Last Name

Membership Status

☐

John

Benton

Active

☐

Will

B

Active

6. Click the blue "+" to apply the criteria.

View Lists

Add Individual

Sort by

Filter

is

Active

Reset

Apply

Submit feedback

Last Name

Membership Status

Location

Last Activity

Fiscal Year Value

Benton

Active

--

--

\$0.00

B

Active

--

--

\$0.00

## 7. Click 'Apply.'

The screenshot shows the 'Muse' interface for managing individuals. At the top, there's a search bar and a user profile icon (JM). Below the header, the 'Individuals' tab is selected. A search bar with 'Search by name' is present. A filter section shows 'Criteria' set to 'Membership', 'Status' set to 'Active', and 'is' as the operator. There's an option to 'Add another criterion' with a 'Filter Category' dropdown and a '+' button. A 'Save search' button is also visible. The table below shows a list of individuals with columns: First Name, Last Name, Membership Status, Location, Last Activity, and Fiscal Year Value. The 'Apply' button is circled in blue.

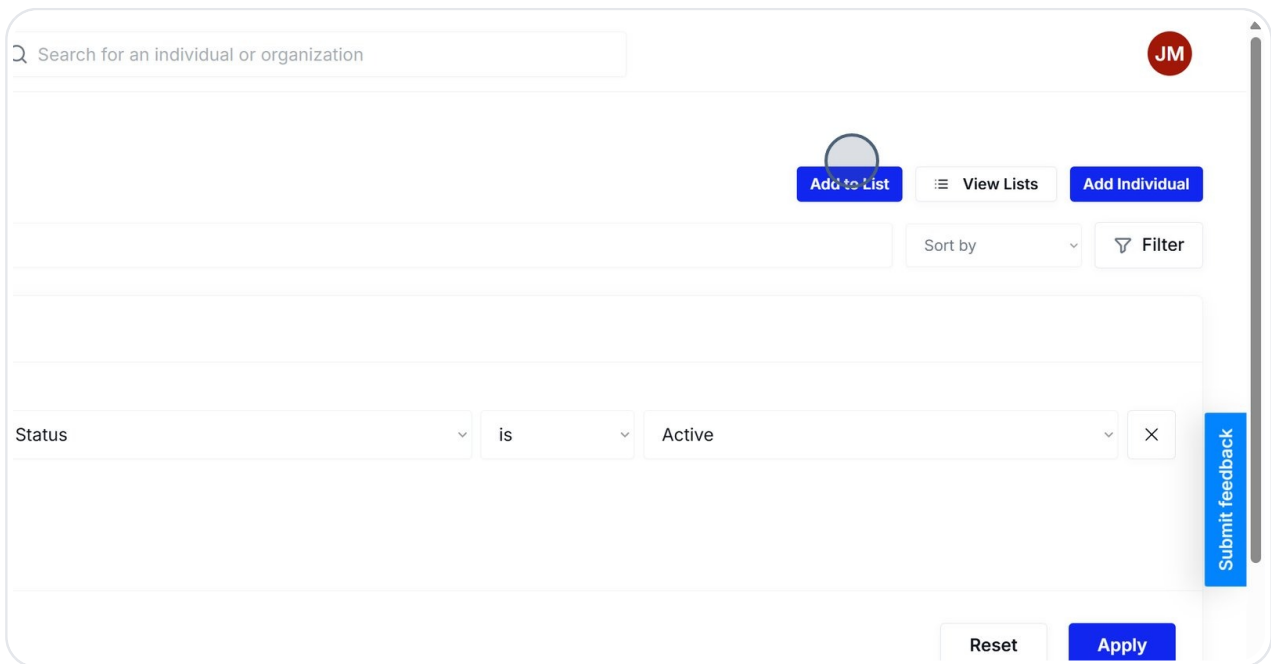
| First Name | Last Name | Membership Status | Location      | Last Activity | Fiscal Year Value |
|------------|-----------|-------------------|---------------|---------------|-------------------|
| John       | Benton    | Active            | --            | --            | \$0.00            |
| Will       | B         | Active            | --            | --            | \$0.00            |
| Megan      | Gill      | Never Member      | Tillamook, OR | 7/16/26       | \$5.00            |
| Josh       | Test      | Never Member      | --            | 7/15/26       | \$79.50           |

## 8. Select all individuals in the filtered list by clicking the header checkbox.

This screenshot is a zoomed-in view of the filter section and the top of the table. The 'Criteria' section shows 'Membership' and 'Status' set to 'Active'. The 'Save search' button is visible. In the table, the 'First Name' header checkbox is circled in blue, indicating that all individuals in the filtered list are selected.

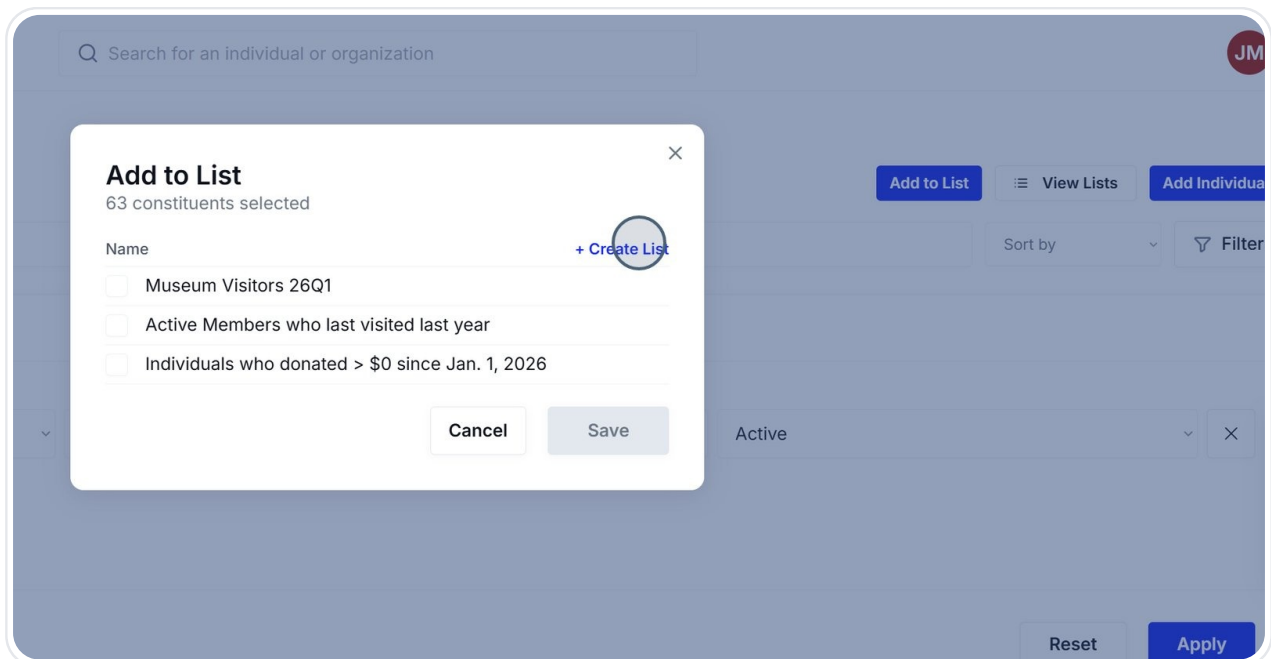
| <input checked="" type="checkbox"/> First Name | Last Name | Membership Status |
|------------------------------------------------|-----------|-------------------|
| <input type="checkbox"/> John                  | Benton    | Active            |
| <input type="checkbox"/> Will                  | B         | Active            |
| <input type="checkbox"/> Jane                  | Adams     | Active            |
| <input type="checkbox"/> Oliver                | Gunderson | Active            |

9. Choose Add to List to organize the selected constituents.



The screenshot shows a web interface for managing constituents. At the top, there is a search bar with the placeholder text "Search for an individual or organization" and a user profile icon labeled "JM". Below the search bar, there are three buttons: "Add to List" (highlighted with a circle), "View Lists", and "Add Individual". Further down, there are filters for "Status" (set to "Active") and "is" (set to "Active"). At the bottom right, there is a "Submit feedback" button. At the bottom center, there are "Reset" and "Apply" buttons.

10. Click "Create List" and follow the prompts.



The screenshot shows the same web interface as before, but with a modal dialog box titled "Add to List" open. The dialog box indicates that "63 constituents selected". It has a "Name" field and a "+ Create List" link (highlighted with a circle). Below the "Name" field, there are three checkboxes with labels: "Museum Visitors 26Q1", "Active Members who last visited last year", and "Individuals who donated > \$0 since Jan. 1, 2026". At the bottom of the dialog box, there are "Cancel" and "Save" buttons. The background interface is dimmed.

11. Enter a clear, descriptive name for your list.

The screenshot shows a 'Create List' modal dialog box. At the top, it says '63 constituents selected'. Below that is a text input field labeled 'Name\*'. The 'Create' button is highlighted with a blue circle. The background shows a search bar and a list of constituents.

12. Press Create to instantly save your new Active Members list.

The screenshot shows the 'Create List' modal dialog box with the text 'Active Members as of 8/7/26' entered in the 'Name\*' field. The 'Create' button is highlighted with a blue circle. The background shows a search bar, a list of constituents, and buttons for 'Add to List', 'View Lists', and 'Add Individual'.