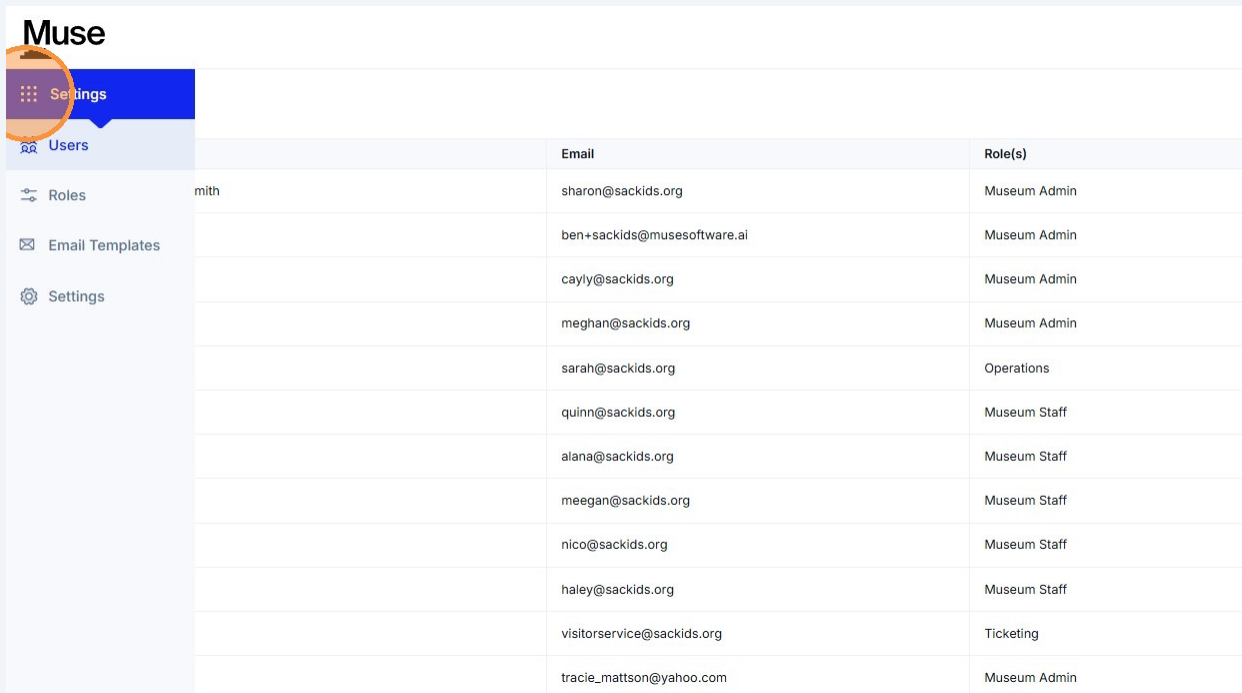


# Creating a Filtered List of Active Members

Learn how to organize your donor database by generating a specific list of active members. This guide will walk you through applying filters to ensure your outreach efforts are targeted toward the right constituents.

1 Click the blue North Star icon.



The screenshot shows the Muse software interface. On the left is a navigation menu with options: Settings, Users, Roles, Email Templates, and Settings. The main area displays a table of active members. A blue North Star icon is highlighted in the top left corner of the table area.

|      | Email                       | Role(s)      |
|------|-----------------------------|--------------|
| mith | sharon@sackids.org          | Museum Admin |
|      | ben+sackids@musesoftware.ai | Museum Admin |
|      | cayly@sackids.org           | Museum Admin |
|      | meghan@sackids.org          | Museum Admin |
|      | sarah@sackids.org           | Operations   |
|      | quinn@sackids.org           | Museum Staff |
|      | alana@sackids.org           | Museum Staff |
|      | meegan@sackids.org          | Museum Staff |
|      | nico@sackids.org            | Museum Staff |
|      | haley@sackids.org           | Museum Staff |
|      | visitorservice@sackids.org  | Ticketing    |
|      | tracie_mattson@yahoo.com    | Museum Admin |

## 2 Click "Fundraising"

The screenshot shows the Muse software interface. On the left, a navigation sidebar is visible with the following items: Settings (highlighted in blue), Users, Roles, Email Templates, and Settings. A dropdown menu is open from the 'Settings' item, showing options: Fundraising (highlighted with an orange circle), Marketing, Operations, Reports, Accounting, and Settings. The main content area displays a table with columns for 'Email' and 'Role(s)'. The table contains the following data:

| Email                       | Role(s)      |
|-----------------------------|--------------|
| sharon@sackids.org          | Museum Admin |
| ben+sackids@musesoftware.ai | Museum Admin |
| cayly@sackids.org           | Museum Admin |
| meghan@sackids.org          | Museum Admin |
| sarah@sackids.org           | Operations   |
| quinn@sackids.org           | Museum Staff |
| alana@sackids.org           | Museum Staff |
| meegan@sackids.org          | Museum Staff |
| nico@sackids.org            | Museum Staff |
| haley@sackids.org           | Museum Staff |
| visitorservice@sackids.org  | Ticketing    |
| tracie_mattson@yahoo.com    | Museum Admin |

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

The screenshot shows the Muse software interface. At the top, there is a search bar with the text "Search for an individual or organization". Below the search bar, the navigation sidebar is visible with the following items: Fundraising (highlighted in blue), Dashboard, Constituents (highlighted with an orange circle), Campaigns, Donations, Events, Tasks, Reports, and Settings. The main content area displays a table with columns for 'Organization Name', 'Campaign', 'Commitment Type', 'Payment Type', and 'Frequency'. The table contains the following data:

| Organization Name     | Campaign     | Commitment Type | Payment Type | Frequency |
|-----------------------|--------------|-----------------|--------------|-----------|
| City Health           | General Fund | Donation        | Money        | One-time  |
| Disposal Organization | General Fund | Donation        | Money        | One-time  |
| Die Maeding           | General Fund | Donation        | Money        | One-time  |
| Don Stone Smith       | General Fund | Donation        | Money        | One-time  |
|                       | General Fund | Donation        | Money        | One-time  |

At the bottom of the main content area, there is a message: "There are no incomplete tasks due today".

## Constituent Filtering

## 4 Click "Filter"

The screenshot shows a web application interface with a search bar at the top containing the text "Search for an individual or organization". Below the search bar, there are tabs for "Individuals" and "All". To the right, there are buttons for "View Lists", "Add Individual", and "Filter". The "Filter" button is highlighted with an orange circle. Below the buttons is a table with the following columns: Last Name, Membership Status, Location, Last Activity, and Fiscal Year Value. The table contains 10 rows of data.

| Last Name | Membership Status | Location            | Last Activity | Fiscal Year Value |
|-----------|-------------------|---------------------|---------------|-------------------|
| Rose      | Active            | --                  | 6/11/26       | \$275.00          |
| Kaur      | Never Member      | --                  | 6/11/26       | \$20.00           |
| Fuentes   | Never Member      | --                  | 6/10/26       | \$0.00            |
| Bellucci  | Active            | --                  | 6/10/26       | \$99.00           |
| Walker    | Never Member      | --                  | 6/10/26       | \$0.00            |
| Maeding   | Never Member      | --                  | 6/10/26       | \$10.00           |
| Myers     | Never Member      | El Dorado Hills, CA | 6/10/26       | \$0.00            |
| Dronov    | Never Member      | --                  | 6/09/26       | \$0.00            |
| Paul      | Never Member      | --                  | 6/09/26       | \$0.00            |
| Gilstrap  | Active            | --                  | --            | \$0.00            |

## 5 Select the "Membership" option.

The screenshot shows the Muse web application interface. At the top, there is a search bar with the text "Search for an individual or organization". Below the search bar, there are tabs for "Individuals", "Organizations", and "All". The "Individuals" tab is selected. Below the tabs, there is a search bar with the text "Search by name". Below the search bar, there is a "Filters" section. In the "Filters" section, there is a dropdown menu with "Membership" selected, highlighted with an orange circle. Below the dropdown menu, there is a "Filter Type" dropdown menu and a "+" button. Below the filters, there is a "Save search" button and a link to "View saved searches". Below the filters, there is a table with the following columns: First Name, Last Name, Membership Status, Location, and Last Activity. The table contains 5 rows of data.

| First Name | Last Name | Membership Status | Location | Last Activity |
|------------|-----------|-------------------|----------|---------------|
| Wendy      | Rose      | Active            | --       | 6/11/26       |
| Davinder   | Kaur      | Never Member      | --       | 6/11/26       |
| Delliah    | Fuentes   | Never Member      | --       | 6/10/26       |
| Janice     | Bellucci  | Active            | --       | 6/10/26       |

## 6 Select the "Status" option.

**Muse**

**Individuals**

Individuals Organizations All

**Filters**

Add a criterion

Membership **Status** is Membership Status +

View saved searches

| <input type="checkbox"/> | First Name | Last Name | Membership Status | Location | Last    |
|--------------------------|------------|-----------|-------------------|----------|---------|
| <input type="checkbox"/> | Wendy      | Rose      | Active            | --       | 6/11/26 |
| <input type="checkbox"/> | Davinder   | Kaur      | Never Member      | --       | 6/11/26 |
| <input type="checkbox"/> | Delliah    | Fuentes   | Never Member      | --       | 6/10/26 |
| <input type="checkbox"/> | Janice     | Bellucci  | Active            | --       | 6/10/26 |

## 7 Select the "Active" option.

MS

ons All

is **Active** +

| Last Name | Membership Status | Location | Last Activity | Fiscal Year Value |
|-----------|-------------------|----------|---------------|-------------------|
| Rose      | Active            | --       | 6/11/26       | \$275.00          |
| Kaur      | Never Member      | --       | 6/11/26       | \$20.00           |
| Fuentes   | Never Member      | --       | 6/10/26       | \$0.00            |
| Bellucci  | Active            | --       | 6/10/26       | \$99.00           |

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

Q Search for an individual or organization MS

ons All View Lists Add Individual

Sort by Filter

Status is Active +

Reset Apply Submit feedback

| Last Name | Membership Status | Location | Last Activity | Fiscal Year Value |
|-----------|-------------------|----------|---------------|-------------------|
| Rose      | Active            | --       | 6/11/26       | \$275.00          |
| Kaur      | Never Member      | --       | 6/11/26       | \$20.00           |
| Fuentes   | Never Member      | --       | 6/10/26       | \$0.00            |
| Bellucci  | Active            | --       | 6/10/26       | \$99.00           |

9 Click "Apply"

Sort by Filter

Status is Active X

+

Reset Apply Submit feedback

| Last Name | Membership Status | Location | Last Activity | Fiscal Year Value |
|-----------|-------------------|----------|---------------|-------------------|
| Rose      | Active            | --       | 6/11/26       | \$275.00          |
| Kaur      | Never Member      | --       | 6/11/26       | \$20.00           |
| Fuentes   | Never Member      | --       | 6/10/26       | \$0.00            |
| Bellucci  | Active            | --       | 6/10/26       | \$99.00           |
| Walker    | Never Member      | --       | 6/10/26       | \$0.00            |
| Maeding   | Never Member      | --       | 6/10/26       | \$10.00           |

# List Creation

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

The screenshot shows a web application interface with a 'Filters' section and a table of individuals. The filters are set to 'Membership is Active'. The table has a header row with a checkbox for 'First Name' highlighted by an orange circle. The table lists individuals with their names, last names, membership status, location, and last updated date.

| <input type="checkbox"/> First Name | Last Name | Membership Status | Location           | Last  |
|-------------------------------------|-----------|-------------------|--------------------|-------|
| <input type="checkbox"/> Wendy      | Rose      | Active            | --                 | 6/11/ |
| <input type="checkbox"/> Janice     | Bellucci  | Active            | --                 | 6/10/ |
| <input type="checkbox"/> Asher      | Gilstrap  | Active            | --                 | --    |
| <input type="checkbox"/> Delani     | Serpell   | Active            | Rancho Cordova, CA | 6/09, |
| <input type="checkbox"/> Mandi      | Peterson  | Active            | Carmichael, CA     | 6/09, |
| <input type="checkbox"/> Lillian    | Hartsock  | Active            | --                 | --    |

11 Click "Create List" and follow the prompts.

Search for an individual or organization

MS

ons All

Create List View Lists Add Individual

Sort by Filter

Status is Active

Reset Apply

Submit feedback

| Last Name | Membership Status | Location | Last Activity | Fiscal Year Value |
|-----------|-------------------|----------|---------------|-------------------|
| Rose      | Active            | --       | 6/11/26       | \$275.00          |
| Bellucci  | Active            | --       | 6/10/26       | \$99.00           |