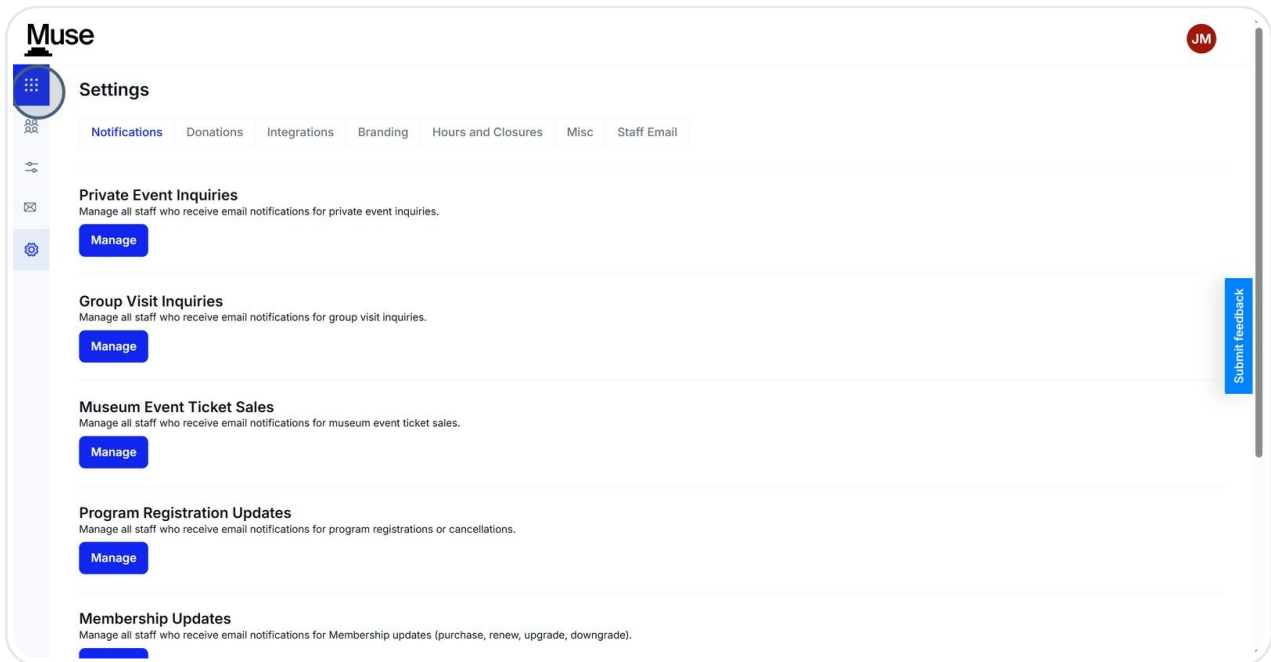


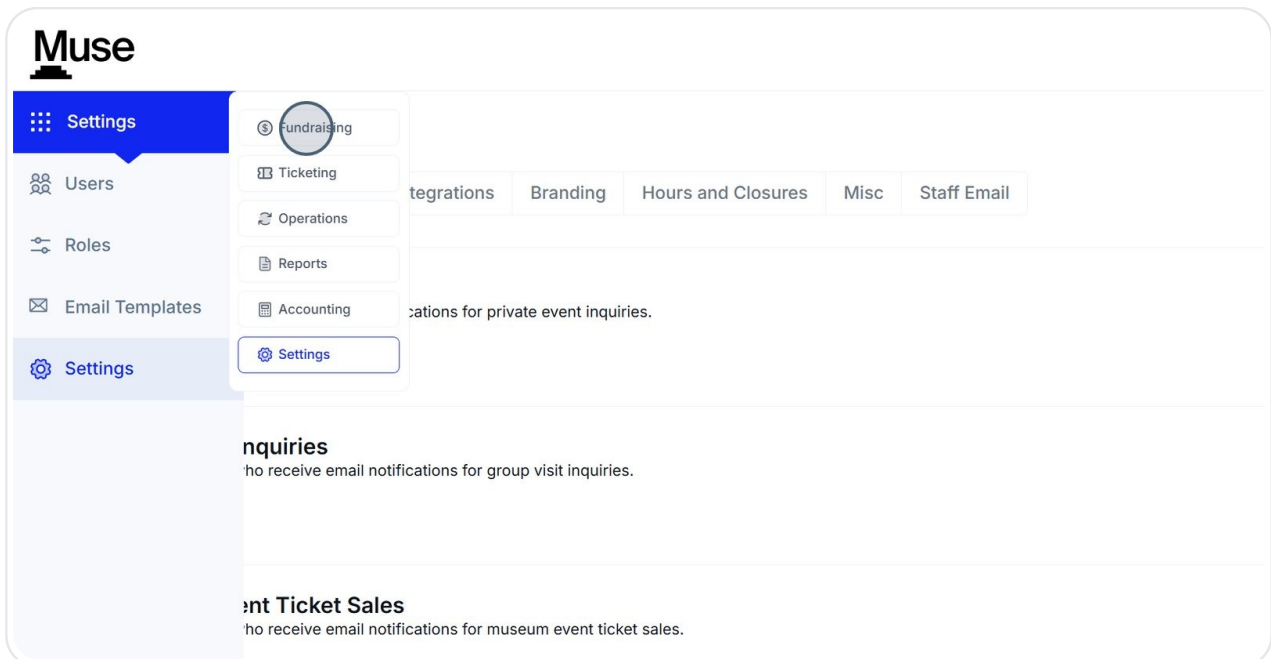


Export List to CSV

1. Click the blue North Star icon.



2. Select 'Fundraising.'



3. Choose 'Constituents' from the Fundraising navigation menu.

Muse

Search for an individual or organization

JM

Fundraising

g Dashboard

Dashboard

Create a contact

Create a task

Record a pledge

Constituents

Campaigns

Donations

Events

Tasks

Reports

Settings

First Name	Last Name	Campaign	Commitment Type	Payment Type	Frequency	Amount
Ben	Test9	General Fund	Donation	Money	One-time	\$225.00
Joshua	Meyer	General Fund	Donation	Money	Monthly	\$25.00
Megan	Matthews-Gill	Scholarship Fund	Donation	Money	One-time	\$18.00
Jake	Francis	General Fund	Donation	Money	Monthly	\$5.00
Carl	Matthews	2026 Capital Campaign	Donation	Money	Monthly	\$5.00

There are no incomplete tasks due today

ersary 27.97%

2026 Capital Campaign 0.60%

Submit feedback

4. Click 'View Lists' to see and organize saved groups of constituents. Please view our article on how to create a list.

Muse

Search for an individual or organization

JM

Individuals

Individuals

Organizations

All

View Lists

Add Individual

Search by name

Sort by

Filter

First Name	Last Name	Membership Status	Location	Last Activity	Fiscal Year Value
Ben	Test9	Never Member	--	9/15/26	\$0.00
Joshua	Meyer	Active	--	9/10/26	\$213.50
Megan	Matthews-Gill	Never Member	--	8/28/26	\$75.00
Jake	Francis	Active	--	--	\$0.00
Carl	Matthews	Active	--	--	\$0.00
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

Submit feedback

5. Select the list you wish to view and export.

Muse

Q Search for an individual or organization

JM

Return to All Constituents

Most recently edited

My Lists

List Name	Constituents
Active Members as of 8/7/26	63
Museum Visitors 26Q1	10
Active Members who last visited last year	16
Individuals who donated > \$0 since Jan. 1, 2026	23

Submit feedback

6. Use the top checkbox to select all members in this list for bulk actions.

Muse

Q Search for an individual or organization

JM

Return to all lists

Bulk Actions

Active Members as of 8/7/26

☐ Name	Type	Location	Last Activity	Fiscal Year Value
☐ John Benton	Individual	--	--	\$0.00
☐ Will B	Individual	--	--	\$0.00
☐ Jane Adams	Individual	--	--	\$0.00
☐ Oliver Gunderson	Individual	--	--	\$0.00
☐ Phyllis Gunderson	Individual	San Francisco, CA	8/14/26	\$343.60
☐ John Smoltz	Individual	--	--	\$0.00
☐ Jules Adams	Individual	--	--	\$0.00
☐ Lora Adams	Individual	--	--	\$0.00
☐ Caleb Adams	Individual	--	7/03/26	\$0.00
☐ Lula Adams	Individual	Oceanside, OR	8/26/26	\$2,173.11
☐ Count Dracula	Individual	Jacksonville, FL	6/25/26	\$95.40
☐ Sam Davis	Individual	--	6/25/26	\$182.14
☐ Maya White	Individual	--	--	\$0.00

Submit feedback

7. Open the 'Bulk Actions' menu to apply an action to selected members.

JM

63 selected Bulk Actions ▾

Type	Location	Last Activity	Fiscal Year Value	
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	San Francisco, CA	8/14/26	\$343.60	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮

Submit feedback

8. Choose 'Export to CSV'

JM

63 selected Bulk Actions ▾

Add to Appeal

Create Mailchimp Tag

Create Bulk Task

Export to CSV

Type	Location	Last Activity	Fiscal Year Value	
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	San Francisco, CA	8/14/26	\$343.60	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮
Individual	--	--	\$0.00	⋮

Submit feedback

9. Click 'Close' to dismiss the export confirmation and keep an eye on your inbox.

Exporting Constituents to CSV

Your export of **63 constituents** records is being processed.

An email will be sent to jen.mendoza+salesdemo@musesoftware.ai in approximately 1 minute with your download.

Close

63 selectedBulk

	Location	Last Activity	Fiscal Year V
	--	--	\$
	--	--	\$
	--	--	\$
	--	--	\$
	San Francisco, CA	8/14/26	\$34
Individual	--	--	\$
Individual	--	--	\$
Individual	--	--	\$
Individual	--	--	\$
Individual	--	7/03/26	\$