

Filter Campaign Users

Last Modified on 05/20/2022 12:44 am EDT

Review and manage your campaign users either through filtering by various status options or searching for an individual user.

Accessing Filters

1. From the Users Container within the Dashboard, click the More button ("...").
2. Select Manage Users.
3. Select dropdown labeled Filter By.
4. Select the preferred filter from the dropdown by clicking on a checkbox.
 - Multiple filter options can be selected at one time.
 - Information will automatically sort by selections.
5. To remove a filter after it is selected.
 - Select the X next to the filter that you would like to remove.
 - Selected filter(s) will be removed.

Your Filters: **With Tickets** ✕

Filter Options Available

The screenshot shows a user management interface with a 'Filter By' dropdown menu open. The modal contains the following filter options:

- Ticket Status**
 - With Tickets
 - Without Tickets
- Bidder Status**
 - With a Bidder Number
 - Without a Bidder Number
- Card Status**
 - With a Card on File
 - Without a Card on File
- Solicitor Status**
 - Solicitor
 - Not a Solicitor
- Donation Status**
 - Donated an Item
 - Did not Donate an Item
- User Type**
 - Individual
 - Company

The interface also includes tabs for 'Details', 'Check-In', and 'Checkout', a search bar with 'Search' and 'Clear Search' buttons, and action buttons for '+ New User', 'Merge Users', and a menu icon '...'.

Ticket Status

Note: Only available when using GiveSmart ticketing.

- With Tickets: Users who are assigned a ticket.
- Without Tickets: Users not assigned a ticket.

Bidder Status

- With a Bidder Number: User with an assigned a bidder number.
- Without a Bidder Number: Users not assigned a bidder number.

Card Status

- With a Card on File: Users that have a credit card on file.
- Without a Card on File: Users that do not have a credit card on file.

Solicitor Status

- Solicited an Item: Users who are added to the Solicitor section of an item.
- Did not Solicit an Item: Users who are not added to the Solicitor section of an item.

Donation Status

- Donated an Item: Users who are added to the Donated By section as a donor of an item.
 - Did not Donate an Item: Users who are not added to the Donated By section as a donor of an item.
-