How to Create a Donor LYBUNT Search Query (Donors who Gave Last Year BUT Unfortunately NOT This Year) and How to Save and Load it as a Search Favorite

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Overview

This article will teach you how to **save** an *advanced* **search query** as a **favorite** and **re-load** it again. *It's useful to store queries you run often to save time, and improve consistency in the future. Saved queries are **dynamic** so as soon as the data changes, the search results will change accordingly. Saved queries are stored in the "Cloud", accessible by any of the database users.*

IMPORTANT: *Saved queries* <u>only</u> *reside within the* **search window** *you build them in (ex: if you save a search in the 'Contacts/Voters/Donors' list it will only be available in that list vs other lists such as Households/Contributions/Etc.)*

💡 **Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: "**#1**", "**#2**" or "**Related Resources**").
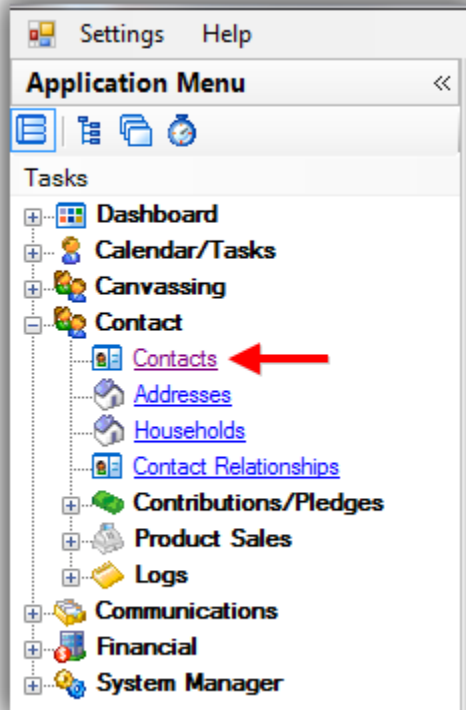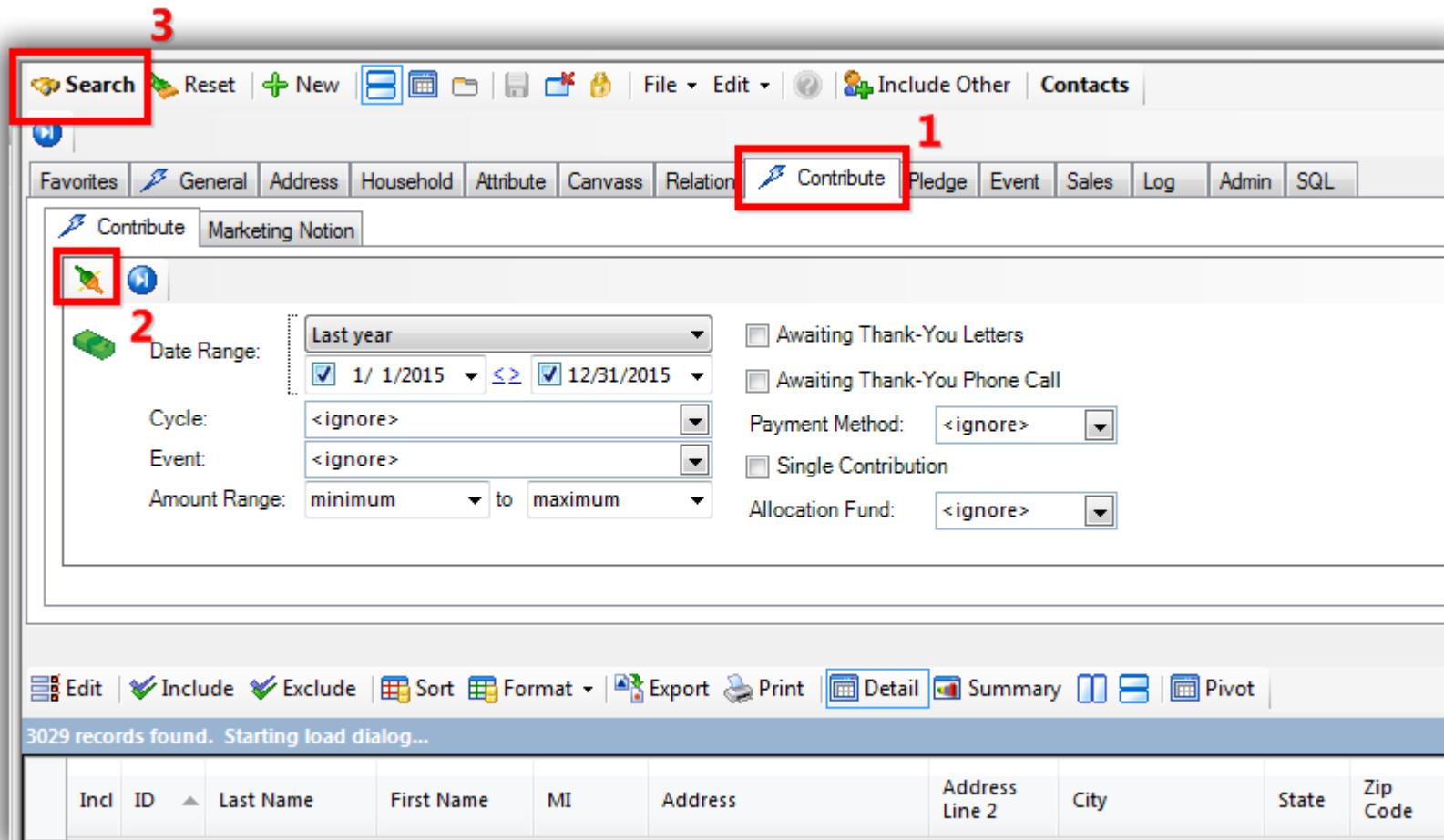
Outline

#1 – Steps to Create an Advanced "LYBUNT" Donor Query

#2 – Save and Load your Search Query as a 'Favorite'

#3 – Related Resources

#1 – Steps to Create an Advanced "LYBUNT" Donor Query

💡 **Tip:** *LYBUNT* and *SYBUNT* queries are extremely useful to solicit lapsed donors.

First, navigate to the **Contacts** (*Donors/Voters*) list under the **Application Menu**.

Navigate to the **Contribute** tab, **[Plug]** it in the tab to activate it, select **Last Year** from the date range drop-down, and then click **[Search]** to execute the query.

IMPORTANT: If you're running on a cycle that's different than a calendar year you'll need to enter those date ranges vs selecting them from the date range drop-down.

In my example I also select 'just individuals' from the General tab, if you don't want to do that it will include both individuals as well as companies.
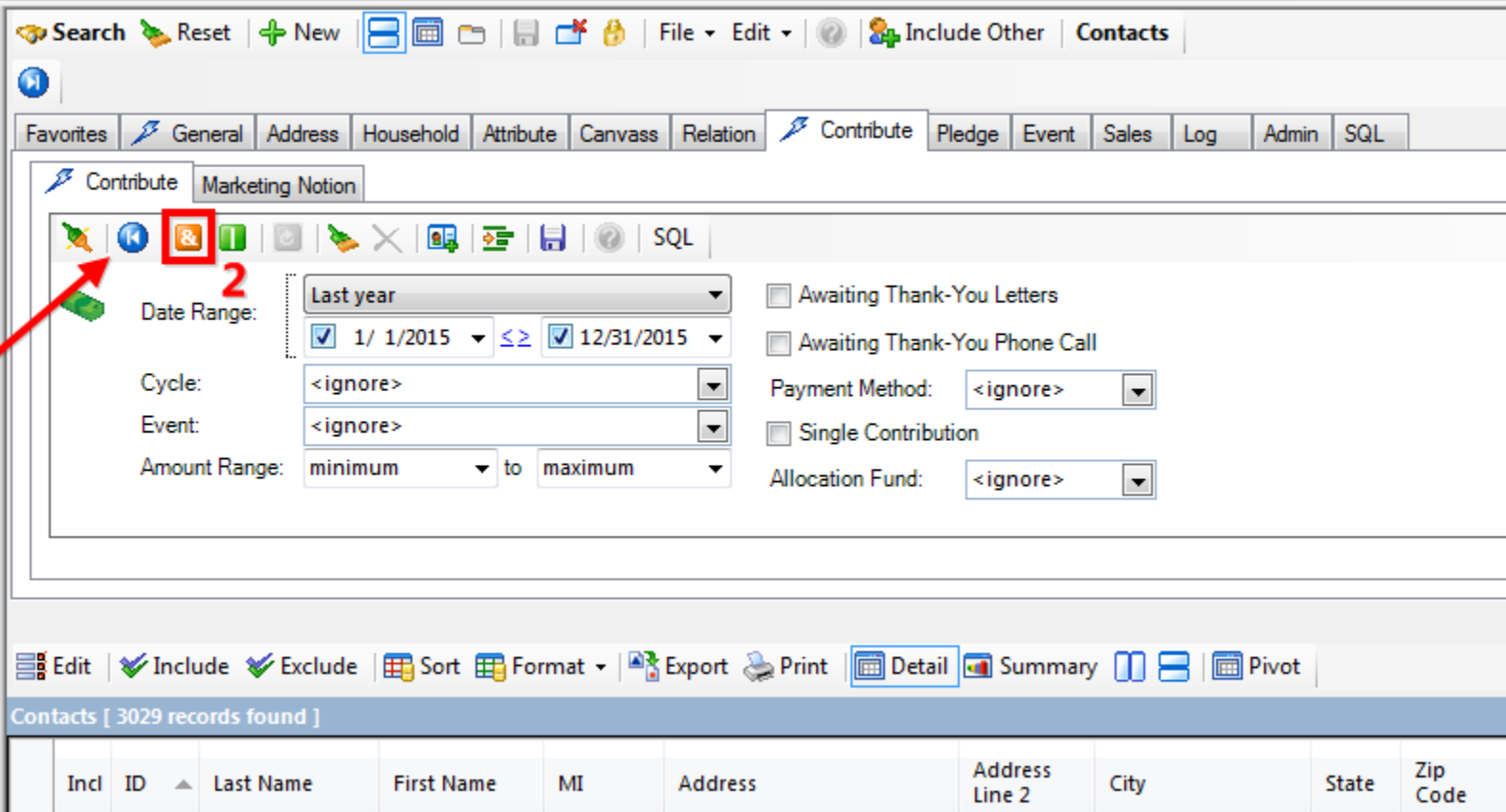
If your record count is over 1k, select the 'all' radio button, and click **[OK]**. *In my example the query produced 3,029 donors who gave last year. If the record count is under 1k it will auto-populate.*

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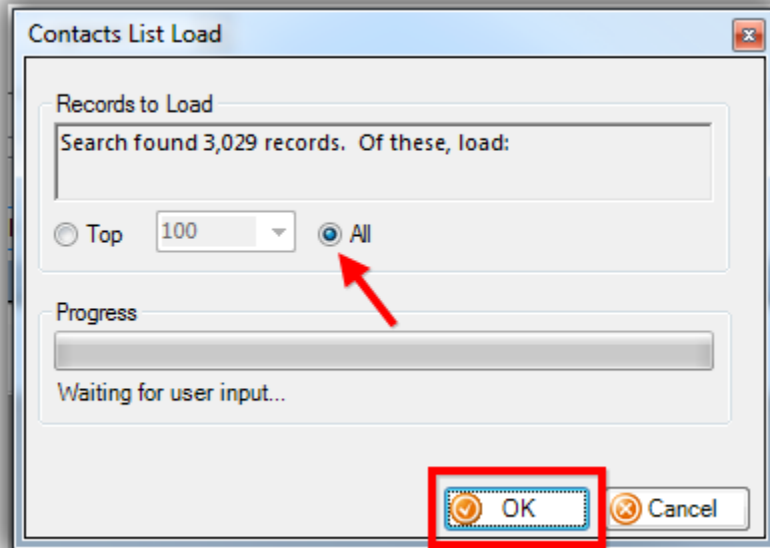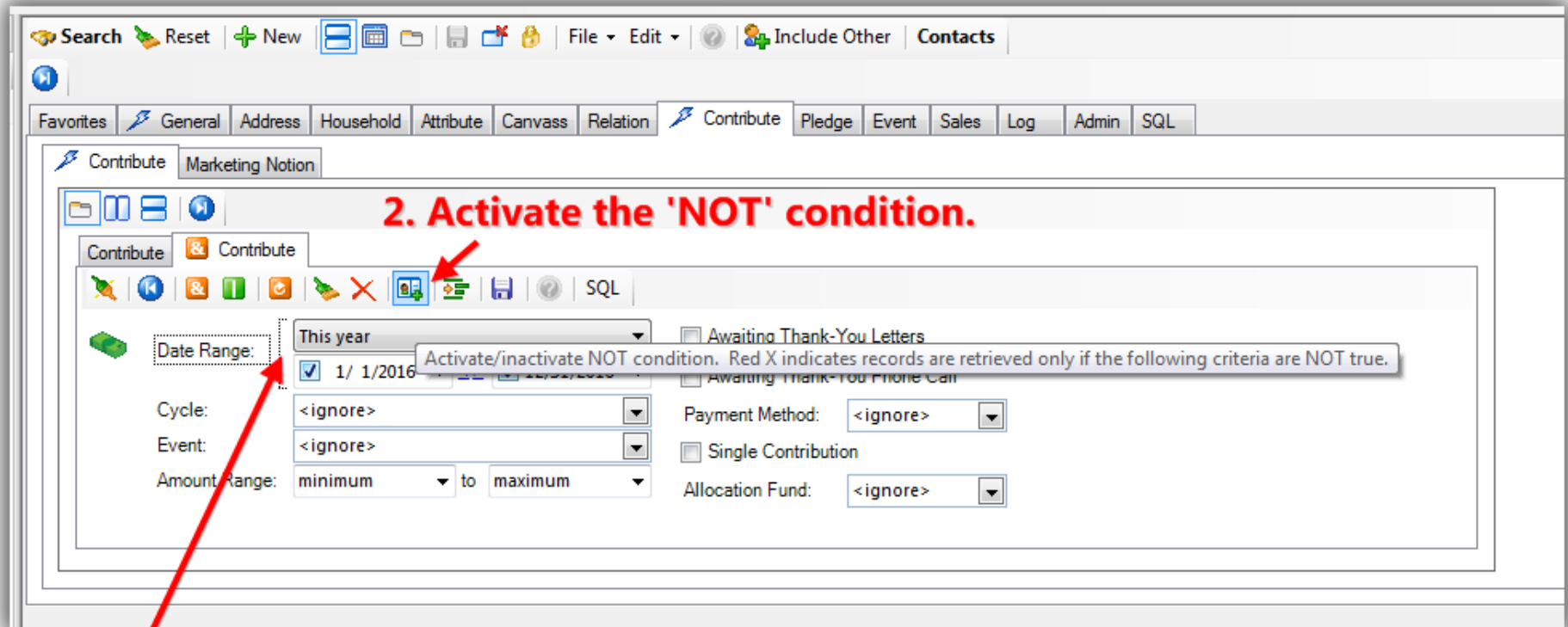
Expand the **Advanced Functions** tool strip by clicking the circular **blue** button, and then click the **orange [&]** button to add an SQL '**AND**' statement. *This will add a new search sub-tab also called 'Contribute'.*
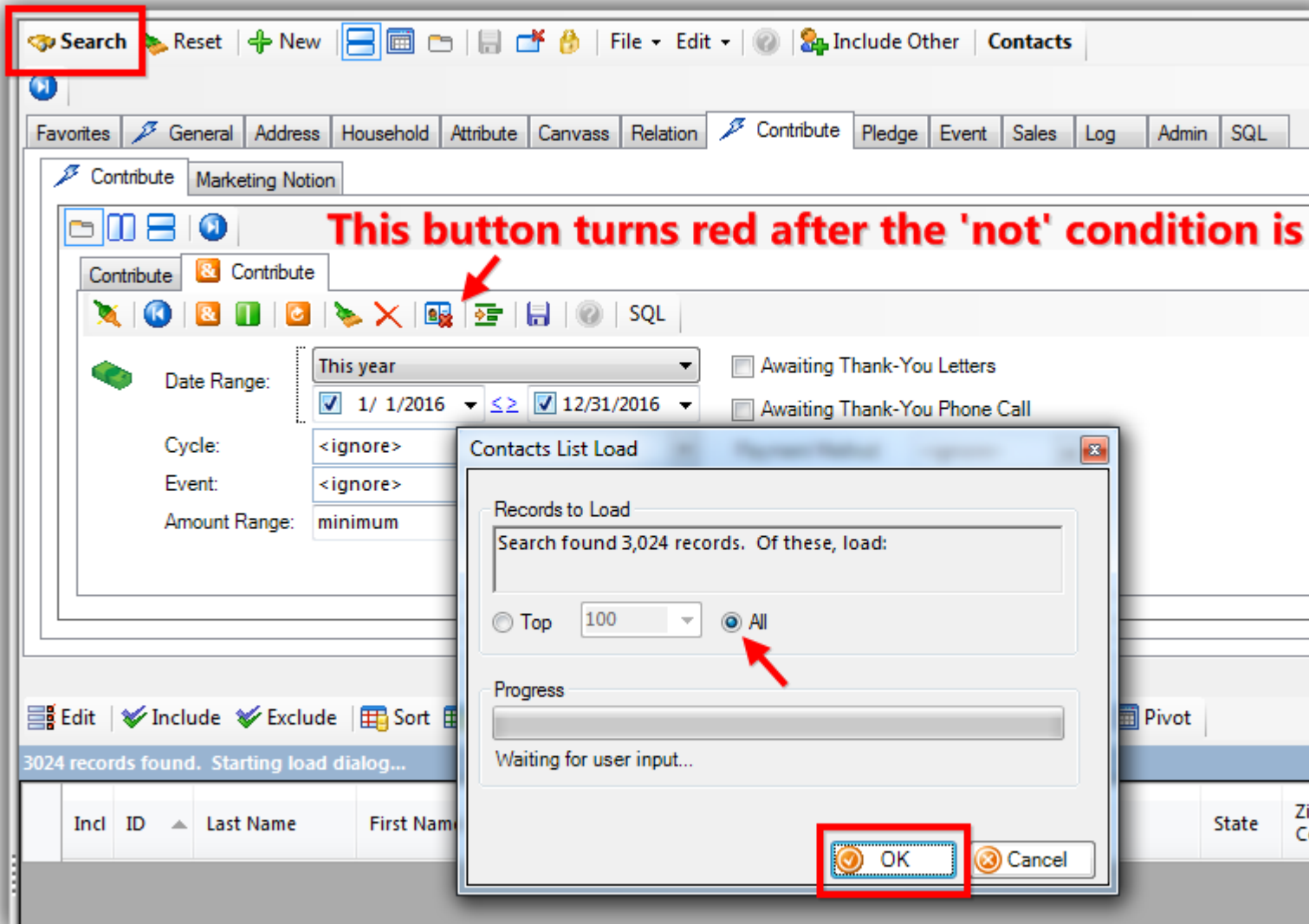
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In the new sub-tab that opens select '**This Year**' from the date range drop-down, and then click on the '**NOT**' condition to activate it. *Once the 'NOT' button is clicked it will turn from a little green + into a red x.*

2. Activate the 'NOT' condition.

Activate/inactivate NOT condition. Red X indicates records are retrieved only if the following criteria are NOT true.

1. Select 'this year' from the drop-down.

Click **[Search]** to refresh your query results and load '**all**' if the list is over 1k. *You could build the entire query without ever clicking [Search] in-between but it's usually beneficial to see the record counts change as new search criteria is added.*

Once the records are populated you may want to verify the query results by building a filtered contribution (giving history) format to display how much your donors have given year-by-year.
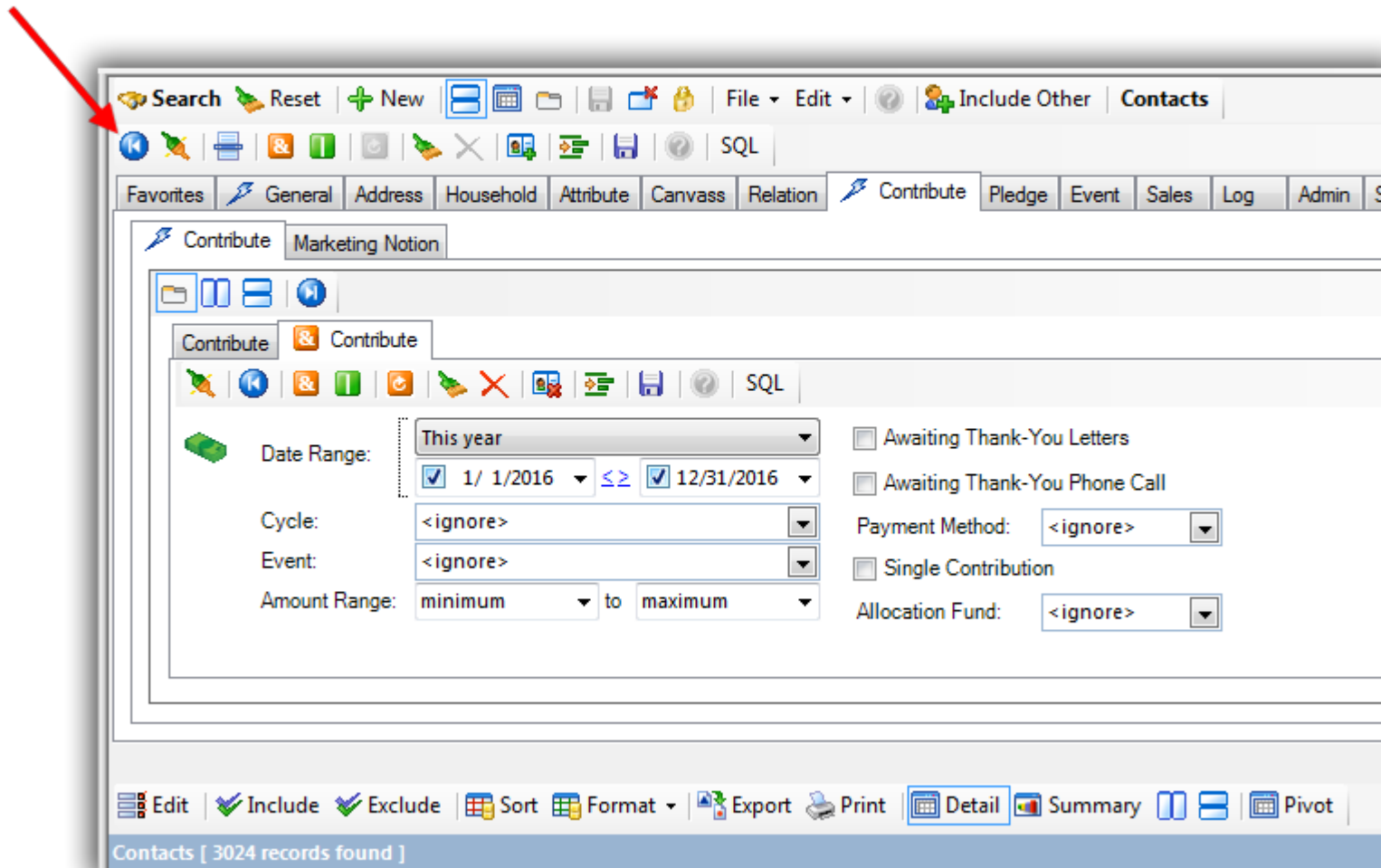
#2 – Save and Load your Search Query as a 'Search Favorite'

Now that the advanced query has been created you may want to save it so that it can be reused in the future.

First, click on the **topmost** [Advanced Function] to expand the **Advanced Function** tool strip. *This is always located directly below the [Search] button as shown in the image below.*

Click this button to expand the Advanced Functions tool strip directly below the [Search] button.

Click the **[Save]** button which looks like a **blue** floppy disc. This will allow you to save the query as a **search favorite**.

**Click the blue 'floppy disc' icon to save your query as a Favorite.**
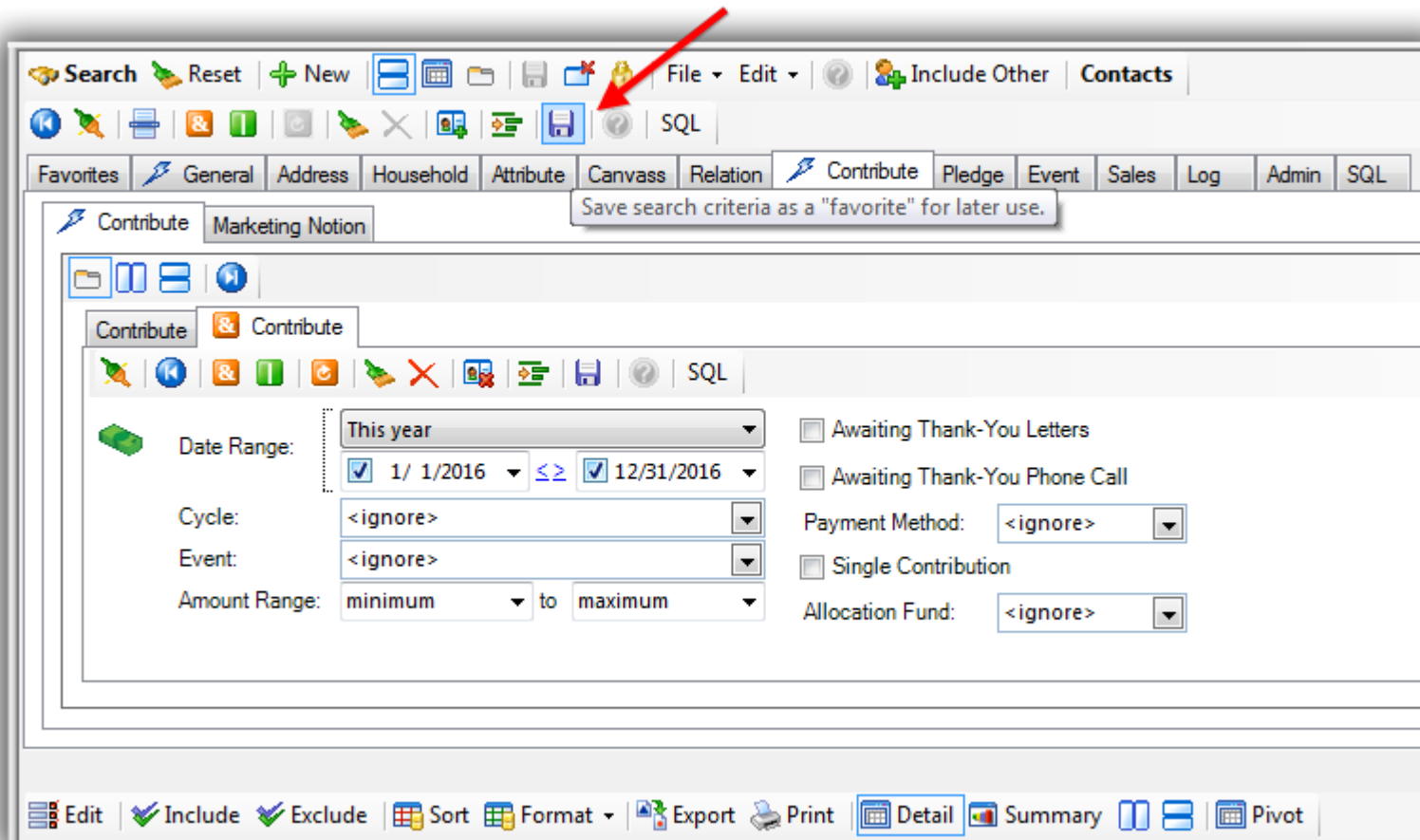
Give the saved search a **descriptive name** that any other user could easily distinguish. *When you or another user loads the query again it won't show you what search criteria is included (unless you are fluent at reading SQL) so it's important to be as descriptive as possible.*

Click **[Save]** to complete the process. *In this example I called my saved favorite "LYBUNT (Last Year But Unfortunately Not This)".*

Give the query a descriptive name.
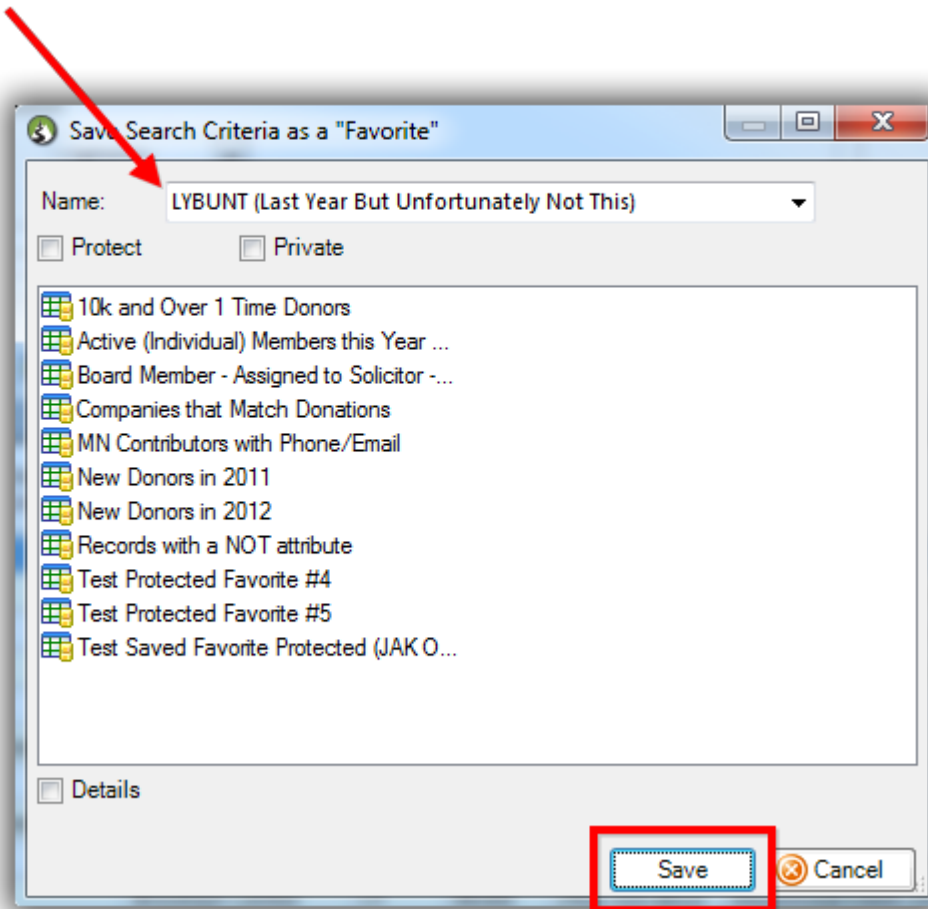
That completes the steps to **save** your search.

To **load** the saved favorite navigate to the **Contacts** (*Donors/Voters*) list, click on the '**Favorites**' tab, **check the box** next to the query you saved, and click **[Search]**.

Tip: You have the ability to **rename** and **delete saved queries**, for more information checkout the **related resources** below.

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- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

#3 – Related Resources

Article: Creating Formats for Custom Views and Editing of Your Data

Article: How to Create a Year-by-Year Giving History Report Using Filtered Contribution Columns in the Grid – Primarily for Nonprofits

Article: Creating Formats

Article: Delete Saved Search Queries

Article: Advanced Queries – the SQL Tab

Article: How to Mass Update a List of Contacts with an Attribute Item

Video: Filtered Contribution Columns in Format

Video: Reporting 104 – Joined tables

Video: Formatting the Grid

Video: Reporting 102 – Quick Reports and Export

Video: Attributes – Add attribute dates and notes to your lists

Video: Filter Using New Date Controls

Video: Search – Contribution AndOr (donated in 1 time period but not another)

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