



Rich Lott (they/them)




artfulrobot.uk



hello@artfulrobot.uk



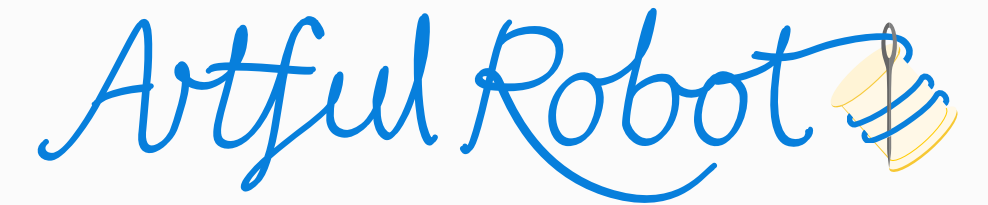
@artfulrobot@floss.social



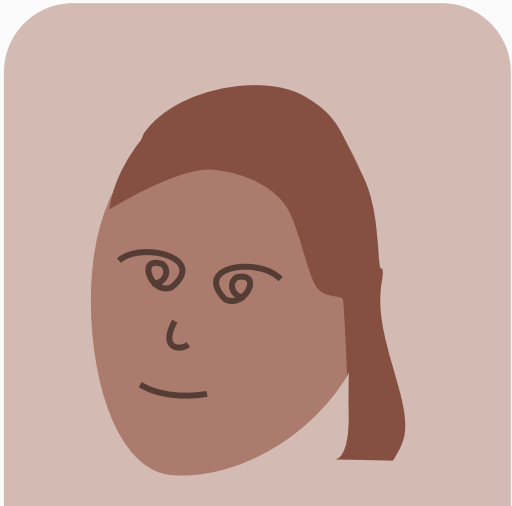

Artful Robot 

*Stitching together the
best open source tech
to help humans
improve humanity.*

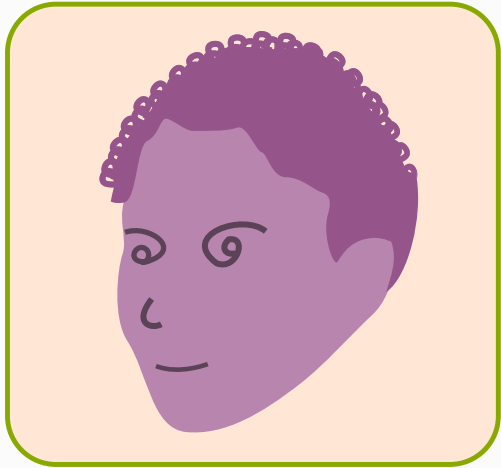
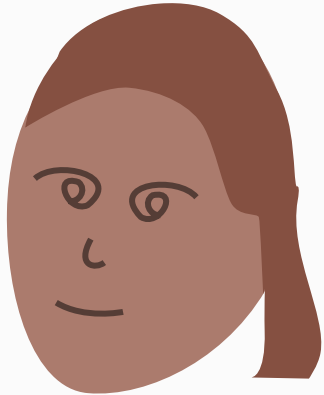
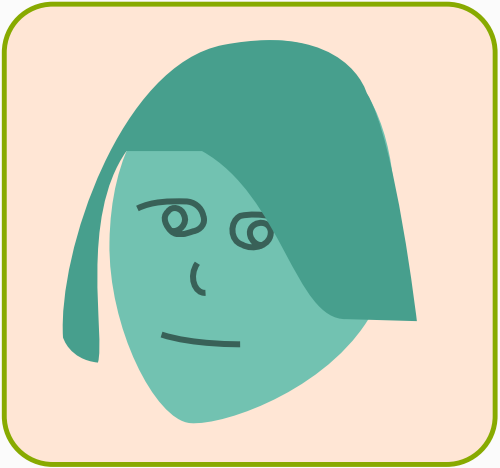


Contact Categories



				
Major gift	€5,000			
Regular			€10/mo	€6/mo <small>NEW!</small>
One-off	€25	€25, €30		€10

"Ask one-off donors for a €5 regular gift"



Ooops!

Asked major donor!

Asked existing regular!

Major gift €5,000

Regular

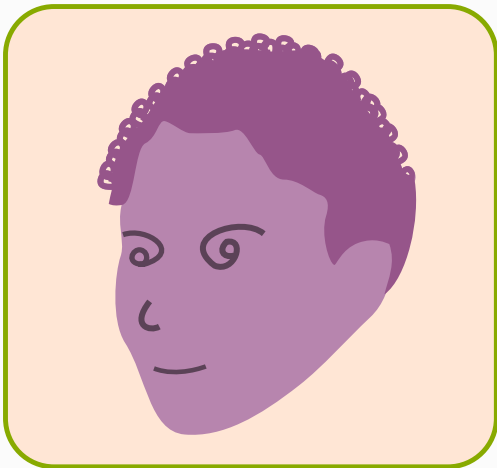
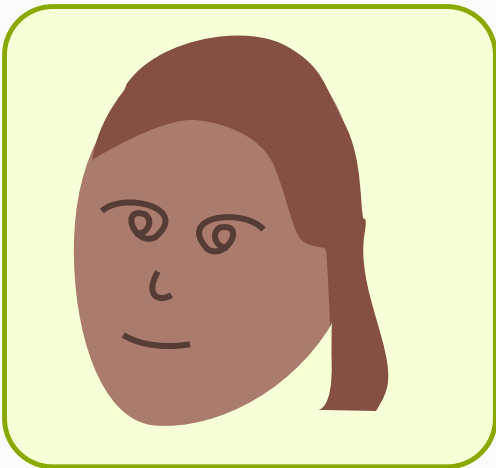
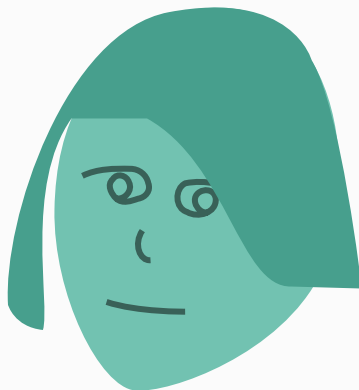
€10/mo

€6/mo NEW!

One-off

€25	€25, €30	€10
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"Ask regulars to increase to €15"



Ooops!

Asked new donor too soon!

Major gift €5,000

Regular

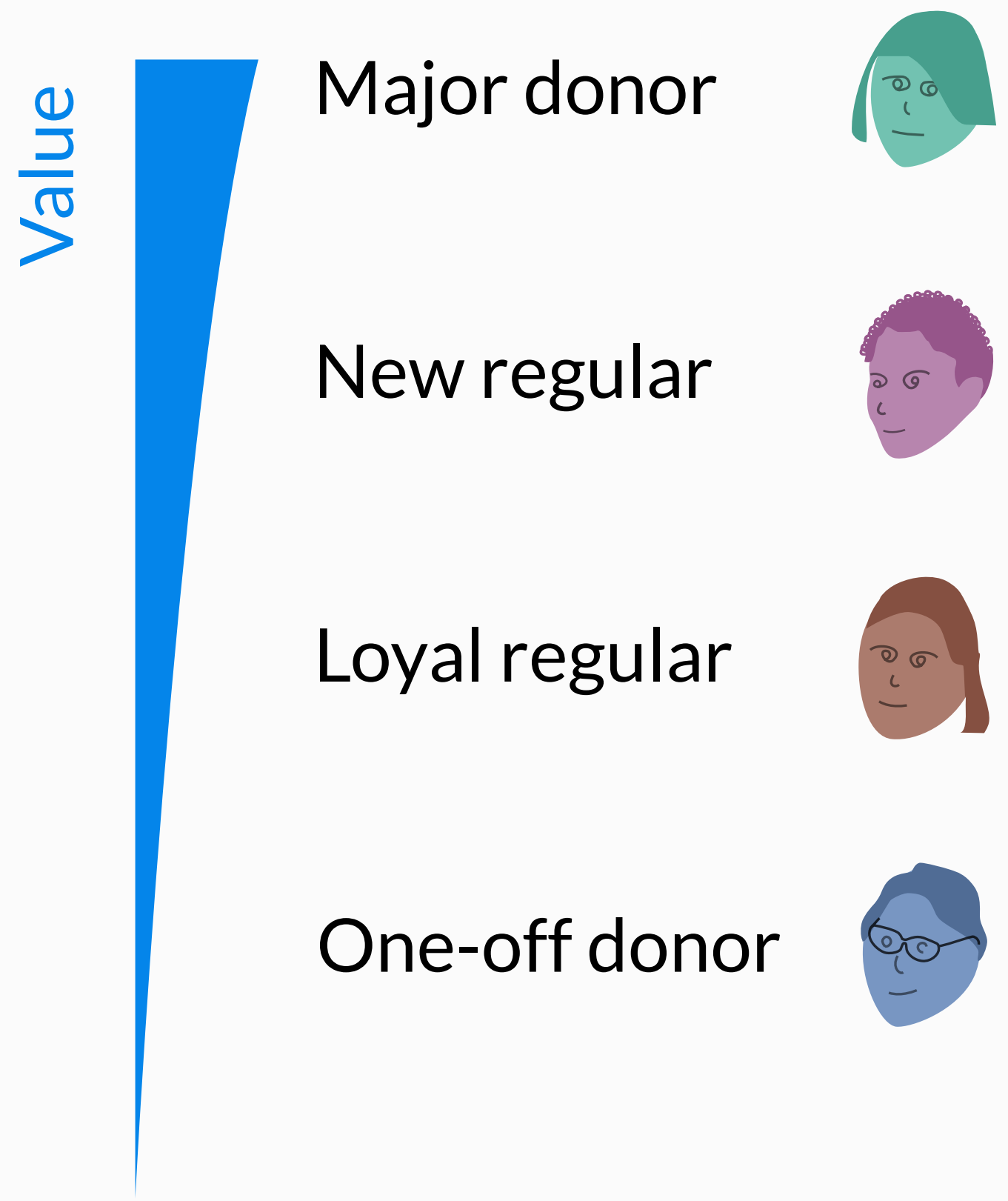
€10/mo €6/mo 

One-off €25

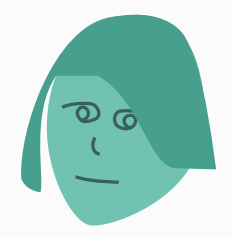
€25, €30

€10

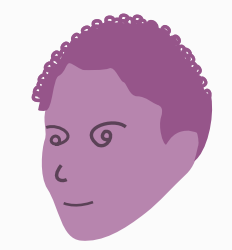
Prioritised Value Categories



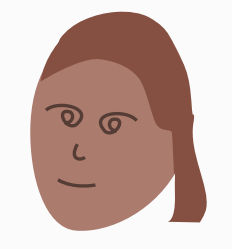
Major donor



New regular



Loyal regular



One-off donor



1 contact = 1 category

Defined by search or group

Standard or custom categories

Easy to use

Changes tracked over time

Automaticly updated

Example



- "VIPs" (manually curated)
- "Buzzing" - recent donations or changes
- "Amazing" - high value regular donors
- "Loyal" - other regular donors
- "Cooling" - people who recently cancelled regular giving
- "Interested" - donated within last 3 months.
- "Missed" 2+ donations over 3 months ago.
- "Drifting" gave once over 3 months ago.
- "Active" never given money, but done some other action recently.
- "Dormant" not done anything for a while.
- "Unreachable" typically without consent for marketing/emails.

Count dashlet, easy search kit lists



Home » CiviCRM

CiviCRM Home

+ 13 Available Dashlets

Contact Category Counts

Shows a list of all categories and how many contacts are in each one.

Category	Count
VIPs	13
Buzzing	2
Amazing	187
Loyal	2090
Cooling	0
Interested	12
Drifting	10090
Signed up	99841
Unreachable	12345

CiviCRM News

Blog Make-It-Happen

- Skvare Extension: Enhanced Job Man...
- CiviCRM 6.6 Release - Thanks to the h...
- The Entity Construction Kit - a develo...
- CiviCRM 6.5 Release - Thanks to the h...
- CiviCRM Security Release (6.4.1, 6.5.0...
- SYSTOPIA Extension of the Month #1
- Streamlining CiviCRM Environments a...
- How we use and contribute to CiviCRM
- Stripe now supports TWINT/IDEAL pa...
- CiviCRM 6.4 Release - Thanks to the h...

Home » CiviCRM » Contacts by Category

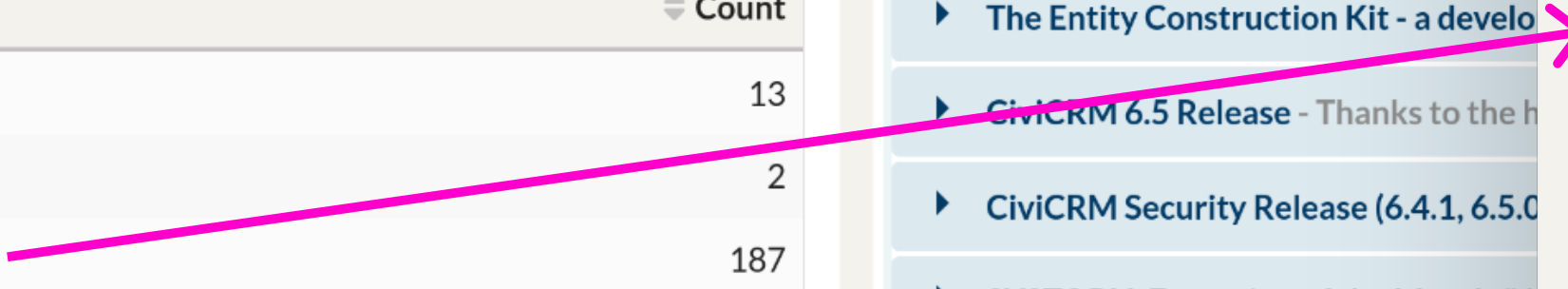
Contacts by Category

Category Definition

* Amazing

Action

<input type="checkbox"/>	Name	Contact Type	Category	Email
<input type="checkbox"/>	Redacted10112, Fred	Individual	Amazing	299728@ex
<input type="checkbox"/>	Redacted10265, Wilma	Individual	Amazing	251514@ex
<input type="checkbox"/>	Redacted10877, Fred	Individual	Amazing	295948@ex
<input type="checkbox"/>	Redacted111297, Fred	Individual	Amazing	283307@ex
<input type="checkbox"/>	Redacted116520, Wilma	Individual	Amazing	288530@ex
<input type="checkbox"/>	Redacted118391, Barney	Individual	Amazing	290429@ex
<input type="checkbox"/>	Redacted118530, Wilma	Individual	Amazing	290568@ex
<input type="checkbox"/>	Redacted118872, Fred	Individual	Amazing	290910@ex



Category clear on summary screen



Redacted203798, Pebbles Edit name

Actions Edit

- Summary 3
- Contributions 2
- Pledges 0
- Memberships 0
- Events 0
- Mailings 0
- Cases 0
- Activities 51
- Relationships 0
- Groups 3

Employer Edit

Job Title

Nickname

Contact Source mailing1065

Tags

Contact Type Individual

Contact ID 203798

External ID

Category: Loyal Settings

Category History

- Fri, 12 Sept 2025 → Loyal
- Sun, 27 Apr 2025 → Buzzing
- Mon, 3 Mar 2025 → Signed up

A pink oval highlights the 'Category' and 'Category History' section of the summary screen.

Recorded as activities



Redacted206327, Fred [Edit name](#)

[Actions](#) [Edit](#)

- Summary 3
- Contributions 12
- Pledges 0
- Memberships 0
- Events 0
- Mailings 3
- Cases 0
- Activities 86**
- Relationships 0
- Groups 4
- Notes 0
- Tags 0
- RFM Analysis 1
- Change Log 1
- Gift Aid Declaration 0

+ New Activity

Filter by Activity

Include: * Changed category
Exclude: - no types excluded -
Date: - any -
Status: - any -

Show 25 entries

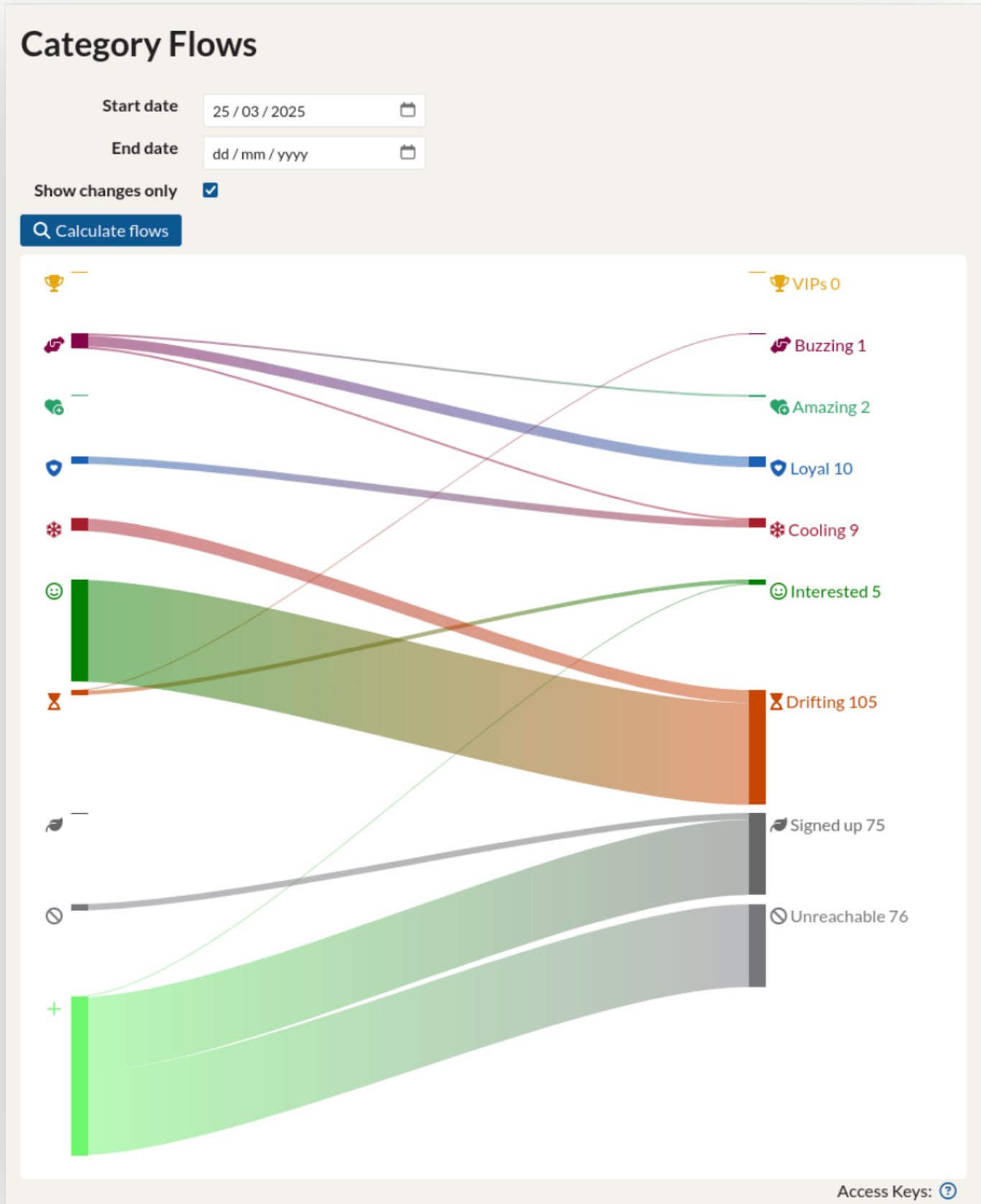
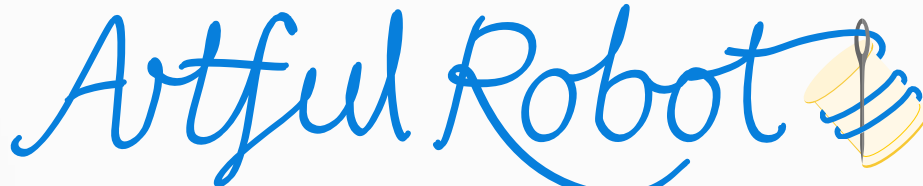
First Previous **1** Next Last

Type	Subject	Added by	With	Assigned	Date	Status	
Changed category	Buzzing → Loyal	openDemocracy	Redacted65072, Fred; (29 more)	n/a	12th September 2025 4:44 PM	Completed	View Edit more ▶
Changed category	Interested → Buzzing	openDemocracy	Redacted206327, Fred; (1 more)	n/a	24th March 2025 3:55 PM	Completed	View Edit more ▶
Changed category	(Unknown) → Interested	openDemocracy	Redacted10021, Barney; (471 more)	n/a	3rd March 2025 1:04 PM	Completed	View Edit more ▶

Showing 1 to 3 of 3 entries

First Previous **1** Next Last

Category flows



Contact Category Settings

Each contact is assigned the first category that matches, using the assignment order. When categories are listed, the presentation order is used.

Show Assignment order Presentation order

Assignment order


Copy from Presentation Order

 **VIPs** Manually curated list of VIPs

 Edit  Delete  Move

 **Unreachable** No consent, missing emails etc

 Edit  Delete  Move

 **Drifting** People who gave a one off in the past but not recently.

 Edit  Delete  Move

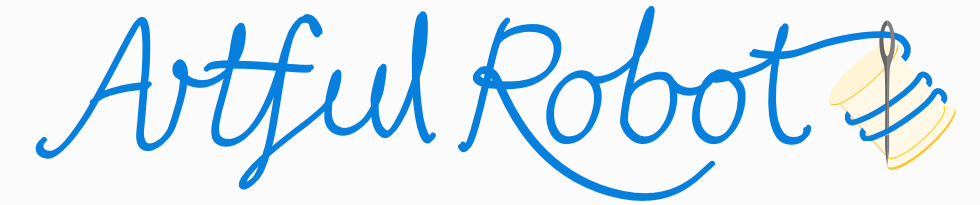
 **Signed up** Subscribers who have never donated

 Edit  Delete

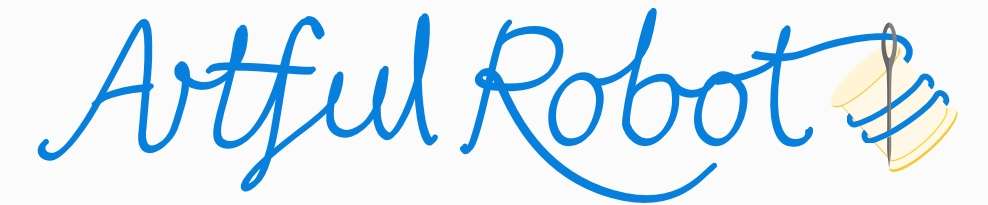
+ Add new category

 Save changes

 Load Fundraising Scheme starter



Settings



Get Contact Categories from:

<https://civicrm.org/extensions/contact-categories>



Rich Lott (they/them)



artfulrobot.uk




hello@artfulrobot.uk



@artfulrobot@floss.social



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