



QUERIES

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Objectives

The purpose of this manual is to instruct users on understanding:

- **How to create a basic query**
- **How query criteria and output tabs work**
- **How query types affect the way data is returned in a query**
- **How to create advanced queries**
- **How specific query tables can be helpful**

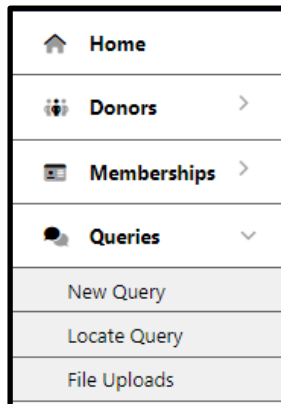
Queries Overview

Queries are the main tool for ad hoc reporting in the Aegis. Queries enable users to look into any major table(s) in Aegis, leverage those table's fields, and pull instant reports that are savable, kept private, or shareable with others. They are also leverageable as the main components in the Home dashboard

Since queries cover all the modules and tables of the Aegis System, they can be quite specific in their setup. In this manual, users will learn how to create a basic query, progress to specific advanced queries, and be able to peruse an appendix of abbreviated steps of the top 25 most used queries by Aegis users.

Queries Module

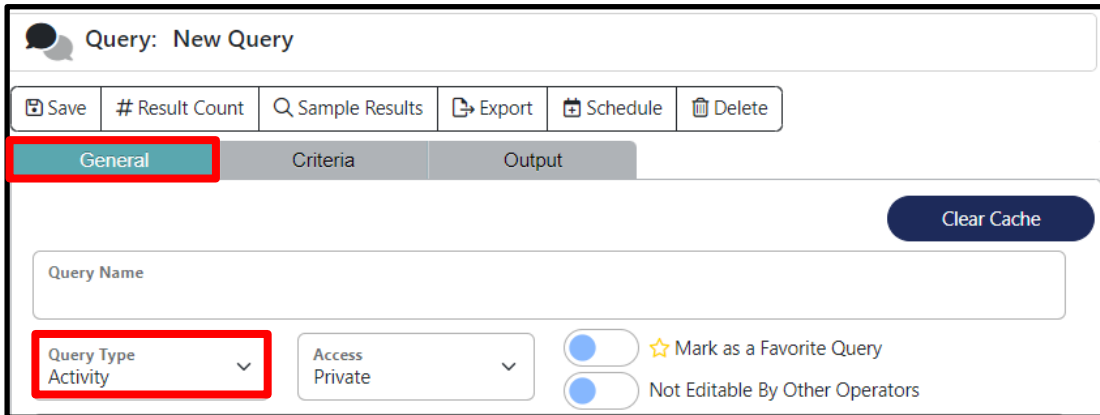
The Queries module has three major sub-modules: **New Query**, **Locate Query**, and **File Uploads**.



- **New Query** – enables user to create a new query.
- **Locate Query** – enables users to locate existing queries by the locate function and/or to view/access the latest queries utilized in a scrolling list.
- **File Uploads** – enables users to upload query criteria into the system from outside sources.

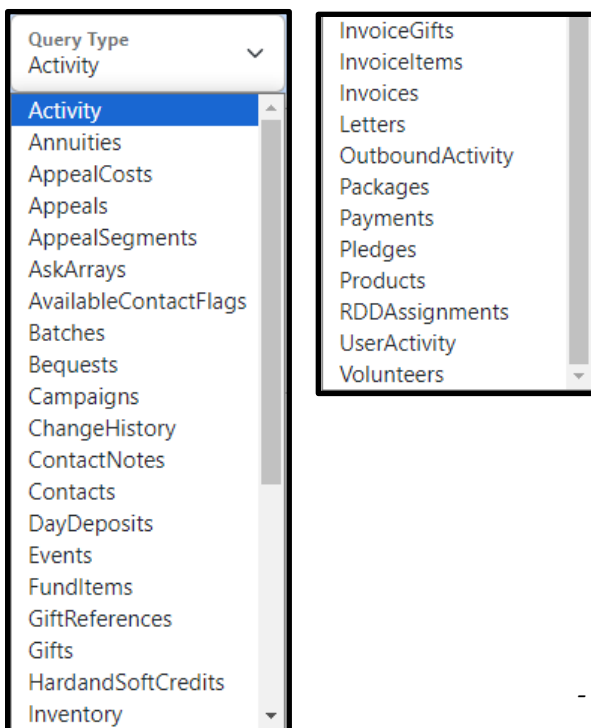
Query Types

The **Query Type** field is located under the **General** tab. It governs which tables users will interact with during the construction of the query. It is the critical field to select accurately and understand if the user wishes to build an effective Query.



The **Query Type** dropdown contains 32 possible values to choose from (See Screen shots below). Each value enable users to leverage multiple natural joins between the primary table – the listed Query Type – and its joined tables (and fields) which are selectable from the **Criteria (and Output)** tab.

What this practically means is once a **Query Type** is selected, the user can select and filter the fields of the joined tables from under the **Criteria** tab, and display those same fields (or others) from under the **Output** tab. To see what folders and fields are available for each Query Type, users can change the Query Type, click on the Criteria (or Output) tab, and observe the joined tables & fields display.



Major Query Types

The following **FOUR Query Types** are the most often used by clients and constitute a large portion of a client's built Queries.

Contacts

- Used to display Donor Names/Addresses per time period, Appeal, Segment, etc.
- Can display giving totals per Donor: Yearly, Lifetime, Counts, Revenue, etc.
- NO individual transaction level data – Use Activity/Gifts/Funds query types
- Used exclusively for Appeal Pulls as it returns ONE donor name for mailing
- IMPORTANT: AVOID using the Activity folder under Criteria/Output – use Activity Or Gift Query Types to return this data
- Accurate for a count of exact number or responses
- CANNOT see Fund Item data in this Query Type

Gifts

- SELECTED Transactions:
 - Positive & Negative values: Donations, Orders, Split Transactions, & Refunds
 - Will NOT display ANY Zero \$ value Transactions
- Effective for Revenue Reporting – track bottom line \$'s
- CANNOT see Fund Item data in this Query Type

Activity

- ALL Transactions:
 - Positive & Negative Transactions: Donations, Orders, Split, & Refunds
 - Zero \$ Value Transactions: Pledges, Donor Edit/Add, & Generic Responses
- Can filter out Transaction Types, BUT should use Gifts for All Revenue
- CANNOT see Fund Item data in this Query Type

Fund Items

- Used predominantly for Financial/Accounting based reporting/audits
- Displays ALL Fund Code values assigned to Split Transactions
 - Other Query Types CANNOT show Fund Code level for Split Transactions or special Contributions - Fund Items Query Type CAN
 - E.G. - A \$75 payment is recorded as:
 - \$50 for Contribution to the 1st Fund
 - \$25 for a Product Purchase to a 2nd Fund

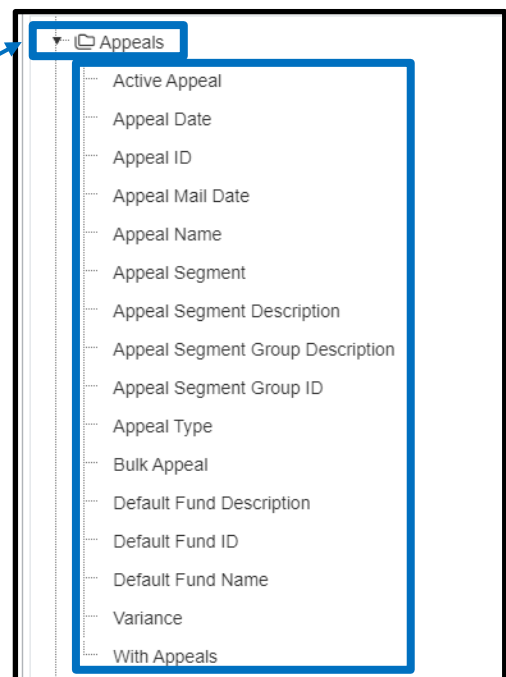
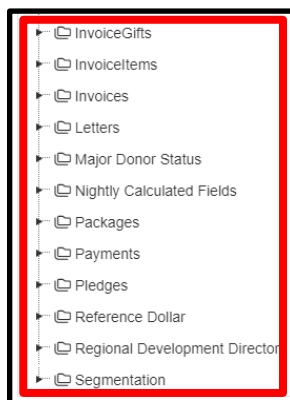
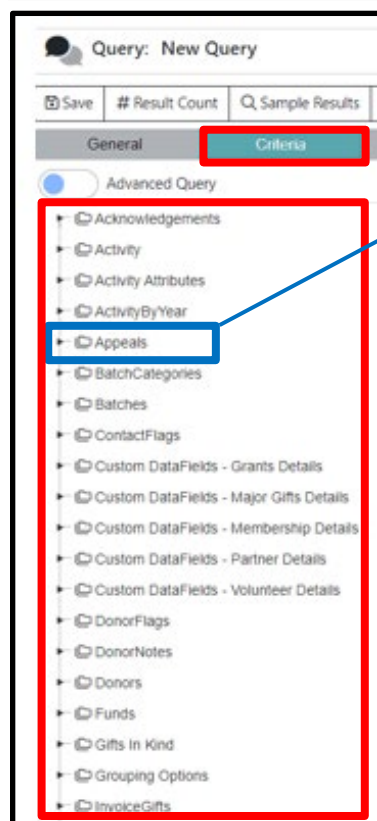
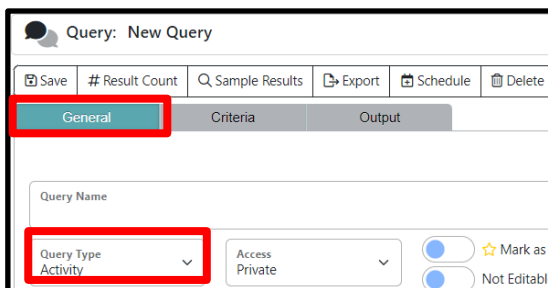
Query Type Differences

The following section emphasize the differences users will experience when choosing a Query Type. Users must be **very particular** about which Query Type they choose: not all tables/fields are available for all query types AND even differ from query type to query type.

Displayed below are the query types of **Activity** and **Gifts**. Both of these types have tables and fields in common: Appeals, Funds, Packages, etc., **BUT** they also differ significantly in both the amount/type of tables available, AND which of those table's fields are selectable. Observe the **differences** in both the Table amounts AND field #'s & names from the same Joined table of **Appeals for Activity & Gifts**.

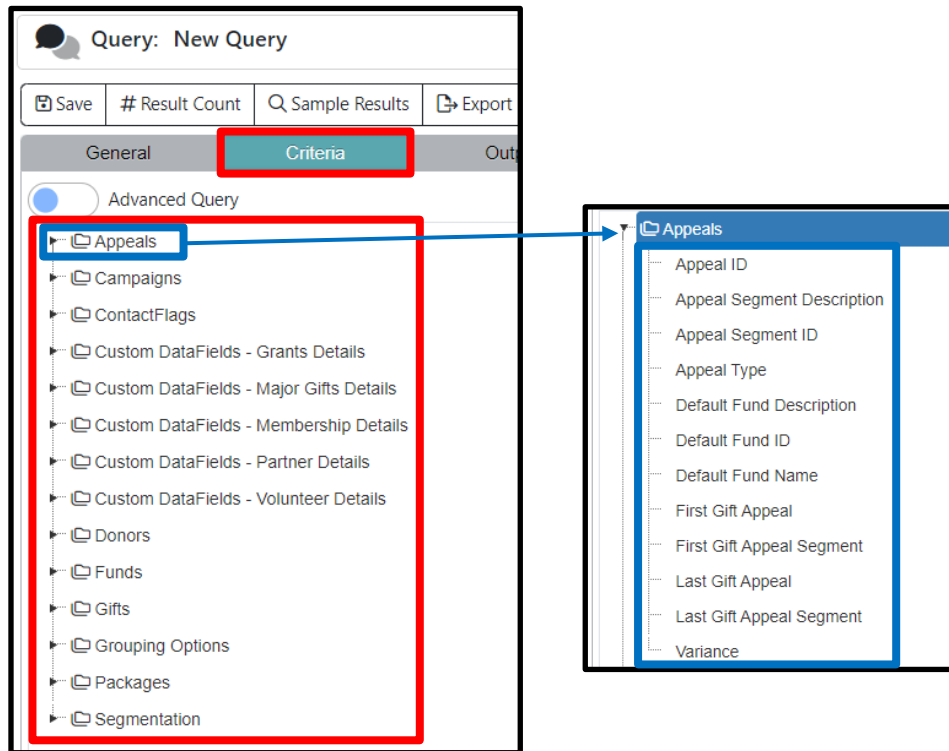
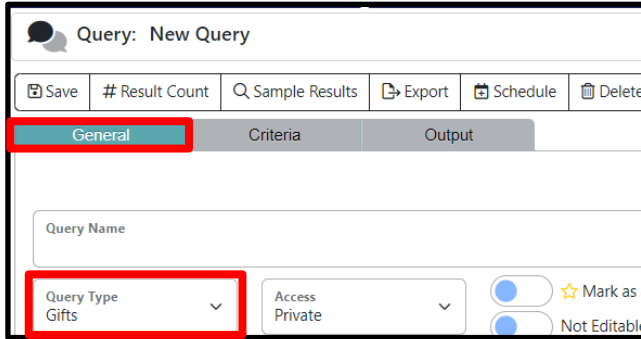
A. **ACTIVITY** Query Type Example:

1. **Query Type** of **Activity** selected.
2. **Criteria** tab displaying the **32 Joined Tables**.
3. **Appeals** joined table displaying the **16 Fields** available for **Filtering**.



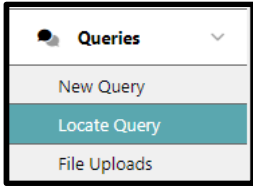
B. **GIFTS** Query Type Example:

1. **Query Type** of **Gifts** selected.
2. **Criteria** tab displaying the **14 Joined Tables**.
3. The **Appeals** joined table displaying the **12 Fields** available for **Filtering**.



Locate Query

Locate Query enables users to quickly search for and access queries they have created or to which they have permissions.



There are **Nine** different fields that a user can search for Queries from in Locate Query with the ability to narrow the search by using more than one at a time. Searching by **Query Type** can be especially effective as it narrows the users search to a dropdown of the 32 query type values and can quickly focus the results.

Once a Search is conducted, the results display below and display columns of data with the Query Name, Description, Query Type, Access Level, Owner, Last Use Date, Modified Date, and Creation Date. Users can open the desired query by clicking on the linked, Query Name.

Locate Query

Name Contains

Owner

Created Between

Created Between

Description Contains

Access ▼

Modified Between

Modified Between

Query Type ▼

★ Favorites

Locate Query
Clear Cache

⏪
⏩
1
⏪
⏩

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42 items in 1 pages

Query Name ▼	Description	Query Type	Access Level	Owner	Last Use Date	Modified Date	Creation Date
YTD: Monthly Revenue & Counts	Year to Date Monthly Revenue & Count Totals	Activity	Everyone	doconnell@wearemoore.com	05/23/2024 1:44:35 PM	04/18/2024 8:04:00 AM	06/12/2023 9:12:15 AM
Yearly: Revenue & Counts	Yearly Donor Revenue & Counts Summary : For DB quality checks and dashboards	Activity	Everyone	doconnell@wearemoore.com	04/18/2024 8:07:02 AM	04/18/2024 8:07:18 AM	02/15/2023 12:56:50 PM
Volunteer Schedule	Volunteer Schedule: Displays Available Volunteers Schedule with days, times, and role.	Volunteers	Everyone	doconnell@wearemoore.com	01/24/2024 5:16:44 AM	01/24/2024 5:16:55 AM	08/15/2023 7:05:11 AM
Transactions per Fund	Transactions per Fund Level (GL): Displays Fund Items level of Transaction records – displays split Gift amount details AND is usually tied to specific Accounting GL.	FundItems	Everyone	doconnell@wearemoore.com	03/01/2024 6:57:25 AM	01/24/2024 5:10:56 AM	06/12/2023 11:13:40 AM
Sol Counts by Appeal	Solicitation Counts by Appeal: Solicitation record counts by Appeal-ID and leveraging the Appeal Pulls Mail Date.	Letters	Everyone	doconnell@wearemoore.com	01/24/2024 5:10:06 AM	01/24/2024 5:10:14 AM	06/12/2023 9:19:08 AM
Sol Appeal Seg Counts	Solicitation Count by Appeal Segment: Count and Revenue per Solicitation records by Segment per Appeal	Activity	Everyone	doconnell@wearemoore.com	01/24/2024 5:10:31 AM	01/24/2024 5:10:38 AM	06/12/2023 11:09:41 AM
Soft Cred Match/Motiv Data	Matching & Motivating Data for Soft Credits Pulls Matching and Motivating data for 2022 Soft Credits. • MATCHING FIELDS in QUERY = The HARD CREDIT (person who wrote the check). • MOTIVATING FIELDS in QUERY = The soft credit (person who motivated the person to write the check).	GiftReferences	Everyone	doconnell@wearemoore.com	05/20/2024 6:04:21 AM	02/29/2024 4:43:47 AM	07/03/2023 11:59:07 AM
Revenue By Segment	2023-2024 Revenue by Segment	Gifts	Everyone	doconnell@wearemoore.com	05/23/2024 12:59:51 PM	02/08/2024 7:38:14 AM	11/21/2023 1:59:14 PM

If users do NOT enter search criteria, the results area will display the latest Queries they have accessed from latest to oldest.

Basic Query Creation

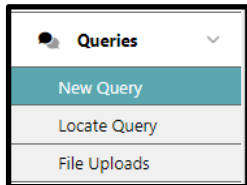
IMPORTANT – BEFORE proceeding to create a Query in Aegis, please check your browser and **enable Pop-ups** (turn OFF Pop-up Blocker for the Aegis CRM site). This will allow the viewing of **Sample Results** and **Reports** when creating queries.

In this manual, **DONORS** will be used as conventional name. Users may have the persons who donate named as **Constituents, Partners, Accounts**, etc. in their DB.

For exercise - Users will be taken through a scenario creating a basic query that will return All Gift Donors of \$100 plus over the past 12 months in California.

Creating a BASIC Query STEPS

1. Navigate to the **Queries** module, **New Query** sub-module.



2. The **New Query** record displays with three tabs: **General**, **Criteria**, and **Output**.

- **GENERAL** – Basic Info/Security: Name, Query Type, Access, & Description.
- **CRITERIA** – Filter Data: Build filters of data. Available Joined tables based on Query Type. Multiple Tables & Fields can be utilized.
- **OUTPUT** – Configure Results: Select Fields to display in the finished query. Sorting, & Aggregation available.

GENERAL TAB

1. In the Query Name field, enter **\$100+ Gifts Past Year in CA**
 - Ensure that the name is easily recognizable and reusable, especially if the plan is to share the Query with others.
2. From the **Query Type** dropdown, select the desired value.
 - EXAMPLE: **Contacts**
 - If unsure of Query Type – read section at beginning of this chapter on **Query Types** and **Query Type Examples**.
3. From the **Access** dropdown, select the desired value.
 - EXAMPLE: **Private**
 - Private – Only You / Everyone – All Users / Admin – Only Admins
4. Turn on the **Mark as a Favorite Query** toggle.
 - On enables users to see the Query displayed the Favorite Queries, Home Dashboard component.
5. Turn on the **Not Editable By Other Operators** toggle.
 - Prevents users who are provided access from editing the Query.
6. In the **Description** field, enter the desired text to describe the Query.
 - EXAMPLE: **Displays \$100 and over donations over the past 12 months for all donors from the state of California.**
 - Used to further describe the query and ensure easily understood.
7. Click on the **Save** button from the button bar.

Query: New Query

Save # Result Count Sample Results Export Schedule Delete

General Criteria Output

Clear Cache

Query Name
\$100+ Gifts Past Year in CA

Query Type
Contacts

Access
Private

Mark as a Favorite Query

Not Editable By Other Operators

Description
Displays \$100 and over donations over the past 12 months for all donors from the state of California.

8. Click the **OK** button.

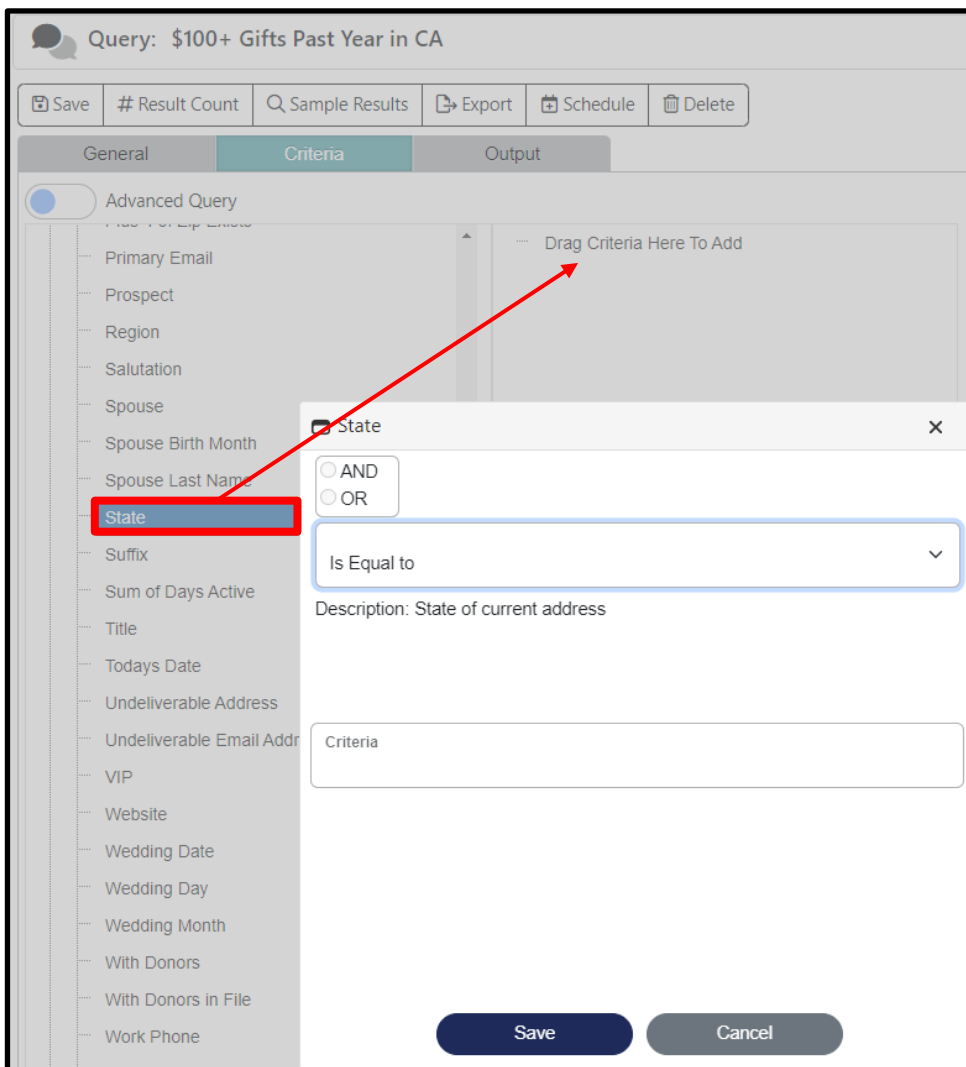
9. The query saves with the **Query Name** embedded in the **Title** section.

The screenshot displays a query configuration interface. At the top, a title bar contains the text "Query: \$100+ Gifts Past Year in CA", which is highlighted with a red rectangular box. Below the title bar is a toolbar with buttons for "Save", "# Result Count", "Sample Results", "Export", "Schedule", and "Delete". The interface is divided into three tabs: "General" (selected), "Criteria", and "Output". In the "General" tab, there is a "Clear Cache" button. The "Query Name" field contains the text "\$100+ Gifts Past Year in CA". Below this, there are two dropdown menus: "Query Type" set to "Contacts" and "Access" set to "Private". To the right of these are two toggle switches: "Mark as a Favorite Query" (turned on) and "Not Editable By Other Operators" (turned on). At the bottom, a "Description" field contains the text "Displays \$100 and over donations over the past 12 months for all donors from the state of California."

CRITERIA TAB

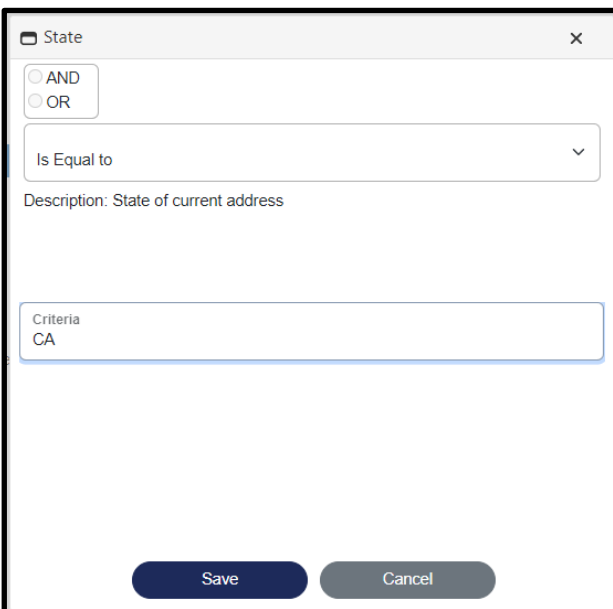
Criteria is the tab where filters are created based on the fields from the available (displayed) tables. Those tables are reliant on the Query Type chosen under the General tab. Criteria determines which data displays in the Output of this query.

1. Click on the **Criteria** tab.
2. Expand the **Donors** table.
3. Drag and drop **State** to the **Drag Criteria Here To Add** column. After dropping, a filter configuration pop-up displays.



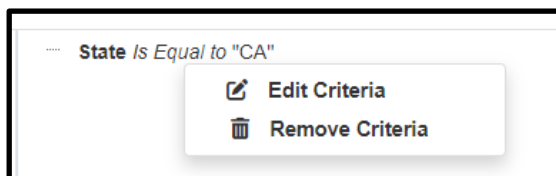
4. The **AND/OR** selection box remains greyed out UNTIL a second criteria statement is added.

- From the **Is Equal to** dropdown, select the desired **Operator**.
 - EXAMPLE: **Is Equal to**
 - Operator values change based on the field type being added: Dropdowns, Text fields, Date pickers, etc. will display as appropriate.
- In the **Criteria** field, enter the desired value.
 - EXAMPLE: **CA**
 - States in Aegis follow the two-letter State designation



The screenshot shows a dialog box titled "State" with a close button (X) in the top right corner. Inside the dialog, there are two radio buttons: "AND" (selected) and "OR". Below these is a dropdown menu currently showing "Is Equal to". Underneath the dropdown is the text "Description: State of current address". A text input field labeled "Criteria" contains the value "CA". At the bottom of the dialog are two buttons: "Save" and "Cancel".

- Click on the **Save** button.
- The **Criteria** is added to the right-hand column.
- Right click on the **Criteria** – users can **Edit** or **Remove** Criteria as desired.



10. Return to the **Table** list in left-column.

11. Contract the **Donors** table

- Do not have to contract; just easier to see full table.

12. Expand the **Gifts** table.

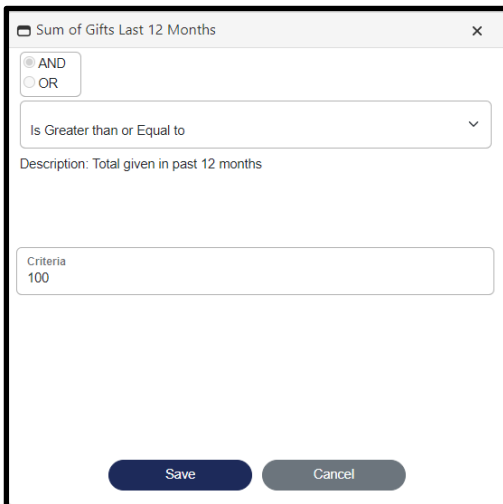
13. Drag & drop **Sum of Gifts Last 12 Months** to **Drag Criteria Here To Add** column.

14. From the **Is Equal To** dropdown, select the desired **Operator**.

- EXAMPLE: **Is Greater than or Equal to**

15. In the **Criteria** field, enter the desired value.

- EXAMPLE: **100**

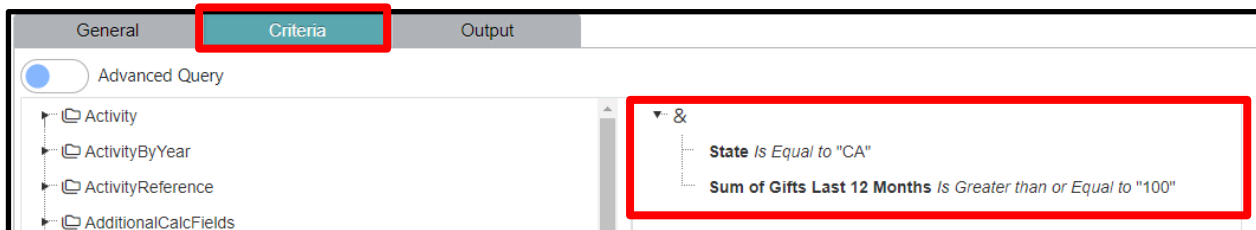


The screenshot shows a dialog box titled "Sum of Gifts Last 12 Months" with a close button (X) in the top right corner. At the top left, there are two radio buttons: "AND" (which is selected) and "OR". Below this is a dropdown menu currently showing "Is Greater than or Equal to". Underneath the dropdown, the text "Description: Total given in past 12 months" is visible. A text input field labeled "Criteria" contains the number "100". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

16. Click on the **Save** button.

17. The **Criteria** is added to the right-hand column.

- NOTE: When multiple criteria lines are initially added, each separate statement displays by default as related to the other by an **& (AND)**.
- The criteria below reads: Donor's **State is Equal to CA AND** the Donor's **Sum of Gifts Last 12 Months is Greater than or Equal to \$100**.
- Later in this chapter, users will see how they can use **OR** instead of AND, or with AND statements, to create more complex criteria filters.

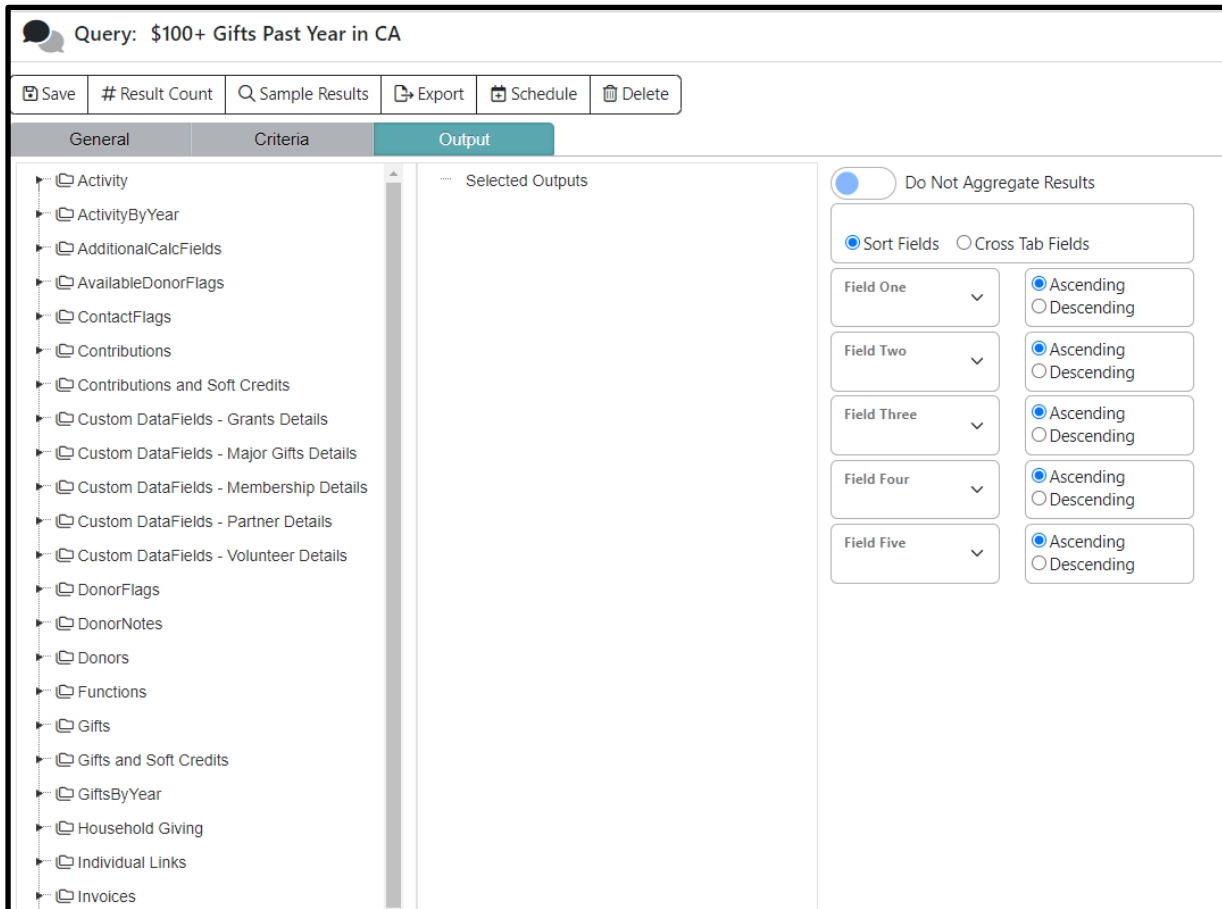


OUTPUT TAB

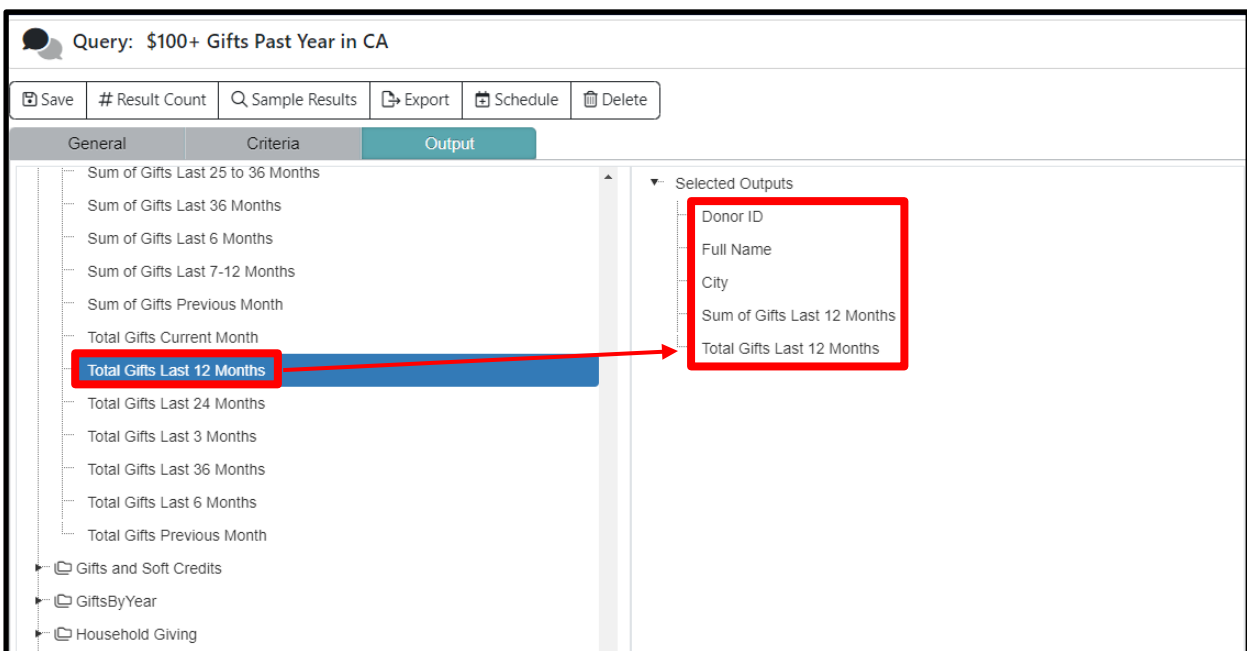
The Output Tab is where users decide which fields should display in the finished query. Users can also decide how to sort & aggregate data from this tab.

1. Click on the **Output** tab.

- Similar layout to the Criteria tab. In this tab, users drag and drop the listed tables fields to the right to decide which to display (not filter).

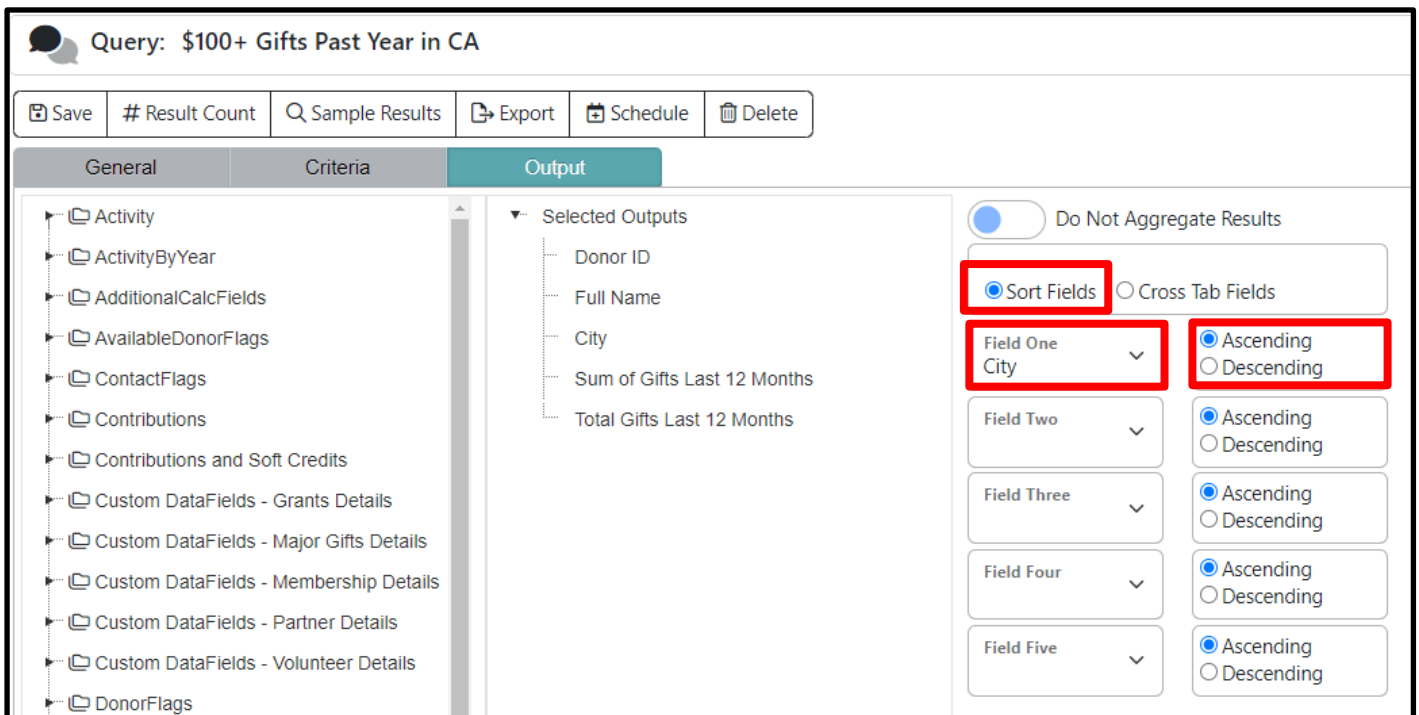


2. Expand the **Donors** table.
3. Drag and drop the **Donor ID**, **Full Name**, and **City** fields to the **Selected Outputs** column (right-hand column).
4. Expand the **Gifts** table.
5. Drag and drop the **Sum of Gifts Last 12 Months**, and **Total Gifts Last 12 Months** fields to the **Selected Outputs** column (right-hand column).
 - The **Total Gifts Last 12 Months** field provides a Count of gifts as output.



NOTE: the **Do Not Aggregate Results** toggle AND the **Cross Tab Fields** radio button functions will be covered in separate sections AFTER this exercise.

6. Ensure the **Sort Fields** radio button selected.
7. Click on the **Field One** drop down and select **City**.
8. Ensure the **Ascending** radio button is selected to the right of **Field One**.
 - Users can choose to Sort in **Ascending** or **Descending** order.
 - Users can **Sort** up to five different fields.
 - The field selected for sorting does NOT have to be present as an Output to be sorted: a user could add Full Name to Output but choose to sort the results based solely on the Last Name.

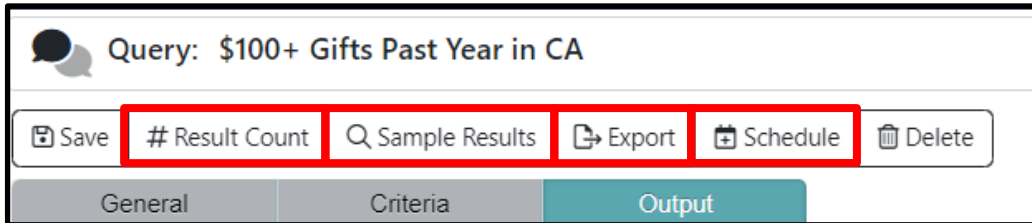


9. **Save** the Query.

RESULTS

In this section users will learn how to view and manipulate the results of the query by exploring the functions of the **# Results Count**, **Sample Results**, **Export**, and **Schedule** buttons.

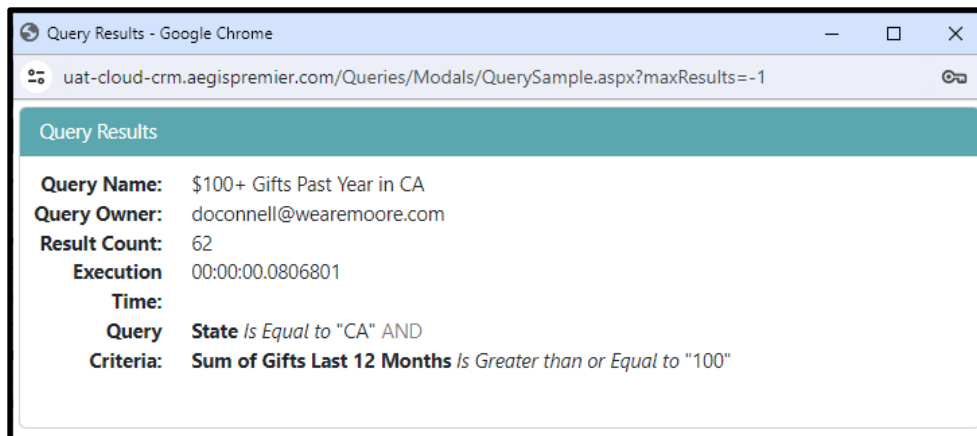
These buttons are static and located at the Top above the current Queries tab.



Results Count

Results Count enables users to quickly determine if the number of results returned meets their expectations.

1. Click on the **# Results Count** button.
2. A **Popup** box will display with the **Results Count**.



3. Close the **Results** popup box.

Sample Results

Sample Results enables users to quickly determine if the fields and the values returned meets their expectations.

1. Click on the **Sample Results** button.
2. Users will receive a scrollable list of the **first 200 results** to review.

Query Results				
Query Name:	\$100+ Gifts Past Year in CA			
Query Owner:	doconnell@wearemoore.com			
Result Count:	62			
Execution Time:	00:00:00.0350031			
Query Criteria:	State <i>Is Equal to</i> "CA" AND Sum of Gifts Last 12 Months <i>Is Greater than or Equal to</i> "100"			
Donor ID	Full Name	City	Sum of Gifts Last 12 Months	Total Gifts Last 12 Months
40667578	Mrs. Mackenzie Amari Ronnie	Auburn	\$125.75	5
40011598	Mrs. Alejandro Haleigh	Beaumont	\$120.00	3
40208947	Marshall Dominique	Bell Canyon	\$100.00	2
40676888	Ann McWalters	Berkeley	\$100.00	4
40666817	Mrs. Micah Krystal	Brea	\$150.00	3
40649493	Demetrius Antonio	Burbank	\$500.00	1
40672599	Mr Rebecca August Blanca	Cerritos	\$250.00	7
40518076	Aliza Destiney	Chualar	\$150.00	3
40004025	Nancy Braeden	Cupertino	\$100.00	2
40154173	Mrs. Derick Madalyn	Del Mar	\$150.00	3
40002621	Sarai Macy	Delano	\$100.00	2
40465784	Katrina Julius	Downey	\$150.00	3
40679147	Michael Martinez	Garden Grove	\$2,700.00	108
40157187	Mr. Ann Ally	Garden Grove	\$175.00	4

3. Close the **Query Results** popup box.

Export

The Export function enables users to export the Query to their email or to a secure location. Users also have the option of deciding upon:

- **Field Delimiters** of Comma, Tab, Pipe, or Tilde.
- **Record Delimiters** of Carriage Return/Line Feed or just Line Feed.
- **Text Qualifiers** of None, Quote, or Apostrophe.

Users can encrypt the results, force User Name and Password recognition, and send to a secure FTP site URL if desired.

1. Click on the **Export** button.

2. The **Job** section, **Description** field will inherit the name of the Query, users can edit this if desired.

NOTE: If an Export exceeds 20 MBs users will no longer receive an email with the attached, exported excel file, they will instead receive an email notification with a link to the Excel file stroed in their Aegis CRM FTP folder.

- IF user clicks the **Export** button – and no advanced security has been enforced or setup - an Excel file will display shortly in the user’s email with full results.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E
	Donor ID	Full Name	City	Sum of Gifts Last 12 Months	Total Gifts Last 12 Months
2	40667578	Mrs. Mackenzie Amari Ronnie	Auburn	125.75	5
3	40011598	Mrs. Alejandro Haleigh	Beaumont	120	3
4	40208947	Marshall Dominique	Bell Canyon	100	2
5	40676888	Ann McWalters	Berkeley	100	4
6	40666817	Mrs. Micah Krystal	Brea	150	3
7	40649493	Demetrius Antonio	Burbank	500	1
8	40672599	Mr Rebecca August Blanca	Cerritos	250	7
9	40518076	Aliza Destiney	Chualar	150	3
10	40004025	Nancy Braeden	Cupertino	100	2
11	40154173	Mrs. Derick Madalyn	Del Mar	150	3
12	40002621	Sarai Macy	Delano	100	2
13	40465784	Katrina Julius	Downey	150	3

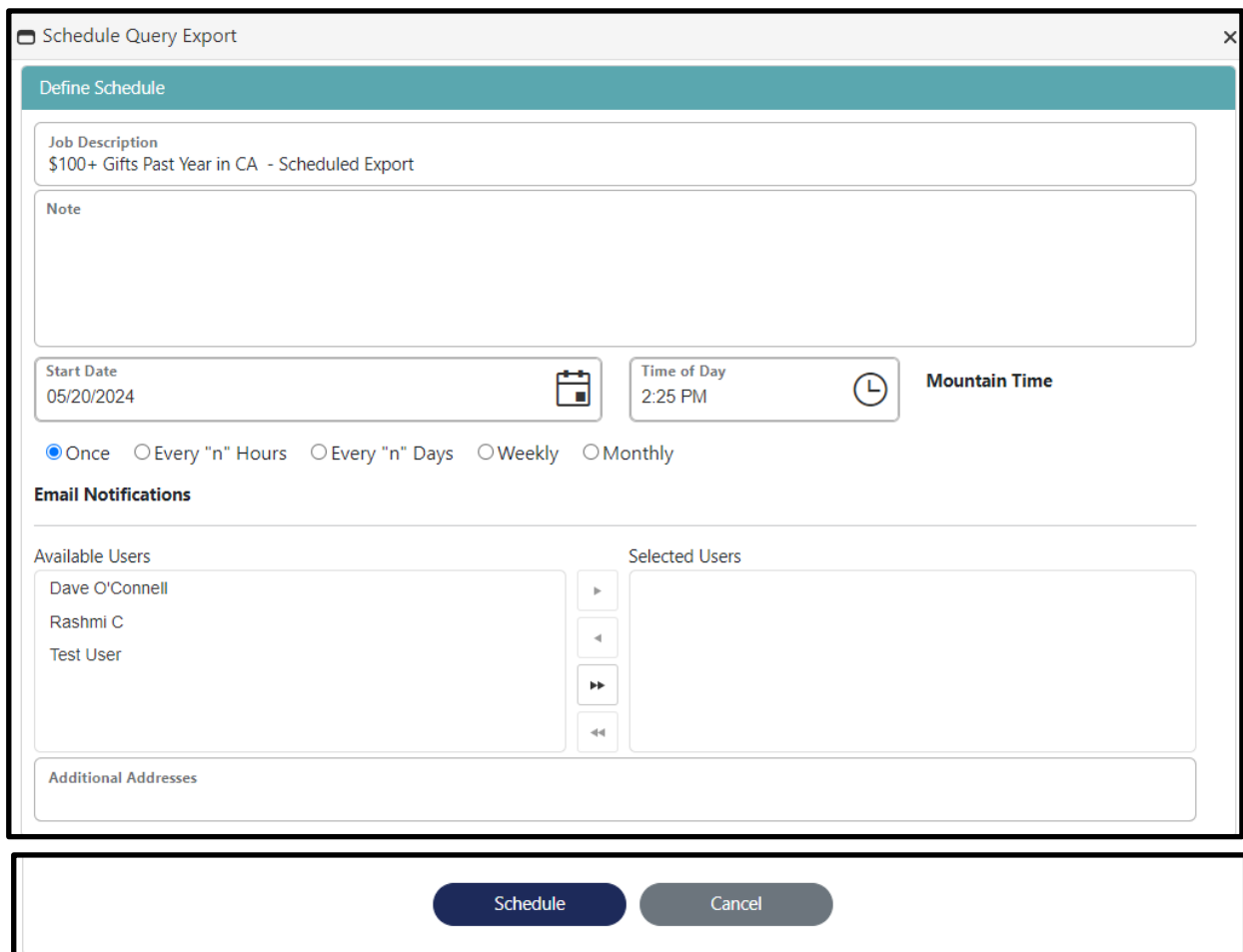
Schedule

The Schedule function enables users to define a schedule for the results of a Query to be delivered to themselves or any of the **Available Users** of the CRM. Users also have the option of entering **Additional Addresses** which are addresses outside the user community.

Users can select the **Start Date, Time, and Frequency** of the scheduled export as well as add a **Note** that will be delivered with each exported instance.

Users can also define the configuration of the Exported file which has the same features as described in the **Export** section on the previous pages.

1. Click on the **Schedule** button.



2. Once users have set up the desired configuration, they can scroll to the bottom of the screen and click the **Schedule** button. The job will be added to the Aegis job queue, run at the defined time and delivered to the Selected Users/Additional Users.

Using Cross Tab Fields STEPS

The **Cross Tab Fields** function enables users to leverage criteria, fields, output, groupings, and values to create a pivot table of selected data. Users can experiment with different Query Types, Folders, and Fields to display from the Criteria and Output sections. They can then select the desired **Group Header** and **Value Fields One, Two, and/or Three**, to discover valuable insights into their data that would not be available via a regular query or report.

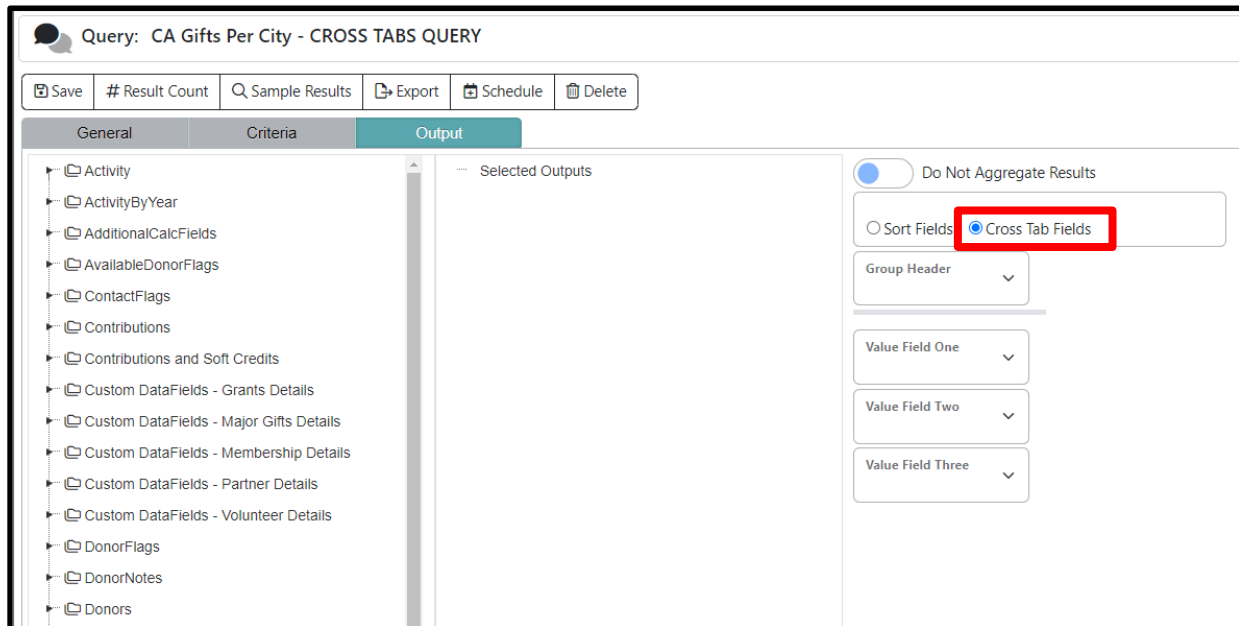
The example below will instruct users on how to create a basic Cross Tab Query using the **Contacts** Query Type with minimal **Criteria**. Users should build off this example to build Cross Tab Queries under other query types and try using multiple Criteria. Once the basics of Cross Tab Fields are understood, it can be a very useful tool for more in-depth use of queries.

1. Click on the **Queries** module>**New Query** sub-module.
2. In the **Name** field and type **CA Gifts Per City – CROSS TABS QUERY**
 - Best practice is to label any Cross Tabs Query in the Name field.
 - The query output will NOT display in **Sample** results or in a **Dashboard**.
3. From the **Query Type** dropdown, select **Contacts**.
4. In the **Description** field, enter **Displays Total Gift Counts, Revenue, and Activity per California city by utilizing Cross Tabs function under Output tab. Must export to Excel; will not display in Sample Results.**
5. Click the **Save** button.
6. Click on the **Criteria** tab.
7. From the **Donors** folder, Drag and Drop the **State** field to the **Add** column.
8. From the **Operator** dropdown, select **Is Equal to**.
 - Users will have to enter criteria property to run a Cross tabs query.
9. In the **Criteria** field, enter **CA**.

10. Click on the **Output** tab.

11. Click on the **Cross Tab Fields** radio button on the upper far right.

- Do **NOT** attempt to add **Selected Outputs** YET.
- IF users are editing an existing non-Cross Tab Query OR have already added Selected Output fields, those values will delete by clicking on the **Cross Tab Fields** button - users will need to re-Add them.



12. From the **Group Header** dropdown, select **State**.

- The Group Header is what the data organized by in the Excel output.

13. From the **Value Field One** dropdown, select **Gift Count**.

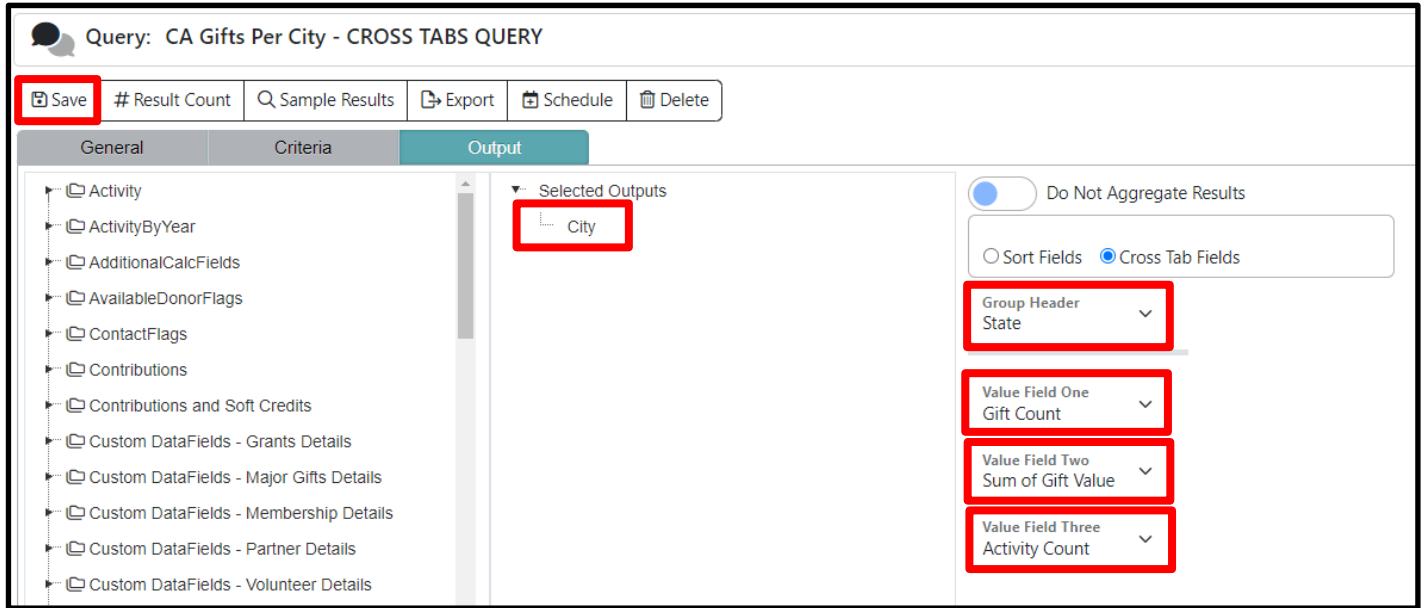
14. From the **Value Field Two** dropdown, select **Sum of Gift Value**.

15. From the **Value Field Three** dropdown, select **Activity Count**.

Now users must **ADD Selected Output field(s) to display:**

16. From the **Output** folder column, expand the **Donors** table.

17. Drag & drop the **City** field to the **Selected Outputs** column (right-hand column).



18. Click on the **Save** button.

NOTE: Sample Results button does NOT work with Cross Tab Fields function

19. Click on the **Export** button.

20. Open **Email** once the exported excel file displays.

- Be patient - could take several minutes to appear in email.

21. Click on the **Excel** file to preview it.

22. Observe the **Excel** file:

	A	B	C	D	E	F	G
1	City	CA-Gift Count	Gift Count Total	CA-Sum of Gift Value	Sum of Gift Value Total	CA-Activity Count	Activity Count Total
2	Agoura Hills	0	0	0	0	0	0
3	Alameda	0	0	0	0	0	0
4	Aliso Viejo	0	0	0	0	0	0
5	Alta Loma	0	0	0	0	0	0
6	American Canyon	11	11	709	709	11	11
7	Anaheim	0	0	0	0	0	0
8	Antioch	1	1	25	25	1	1
9	Anza	1	1	35	35	1	1
10	Apple Valley	0	0	0	0	0	0
11	Arleta	1	1	25	25	1	1
12	Arroyo Grande	1	1	35	35	1	1
13	Atascadero	0	0	0	0	0	0
14	Atherton	0	0	0	0	0	0
15	Auburn	23	23	575.75	575.75	23	23
16	Bakersfield	16	16	721	721	16	16
17	Banning	0	0	0	0	0	0

23. Users can clearly see the listing of **California Cities** and the **Gift Count Total**, **Sum of Gift Value**, and **Activity Count Total** per City.

- User see the same columns and column values 2X as the data is filtered for ONLY the state of California, which is why the CA-Gift Count and Gift Count Totals, as well as the other columns, are repetitive.

Using Do Not Aggregate Results STEPS

The **Do Not Aggregate Results** function enables users to NOT aggregate (sum up) the results of calculated fields that are brought in as Selected Outputs under the Output Tab. Users may turn Aggregation off when desiring to see each individual line item of a normally calculated field. For instance, when calculated fields are non-aggregated for Activity, and the Activity Count calculated field is used, users see a line item for EVERY activity record per donor and not an aggregated number.

If this button is unchecked, then the system WILL aggregate the results of the calculated field. Aggregation targets whatever the calculated field is counting.

- For a list of ALL calculated fields affected by the **Do Not Aggregate Results** radio button, go to **Appendix A: Calculated Fields by Query Type**.

The following example will demonstrate a Query with a Query Type of Activity and the Activity Count calculated field selected. The following scenarios will be covered:

- A. **Sample Results** run with the **Do Not Aggregate Results** NOT SELECTED
- B. **Sample Results** run with the **Do Not Aggregate Results** SELECTED.
 - Note: By Default, all new Queries have the **Do Not Aggregate Results** radio button NOT SELECTED.
- C. **Sample Results** run with the **Do Not Aggregate Results** NOT SELECTED **AND** expanded fields preventing aggregation.

1. Click on the **Queries** module>**New Query** sub-module.
2. In the **Name** field and type **Activity Count – Do Not Aggregate Example**
3. From the **Query Type** dropdown, select **Activity**.
4. In the **Description** field, enter **Used to demonstrate the Do Not Aggregate Results radio button function under the Output tab**.
5. Click the **Save** button.
6. Click on the **Criteria** tab.
7. From the **Activity** folder, Drag and Drop the **Activity Count** field to the **Add** column.
8. From the **Operator** dropdown, select **Is Greater than or Equal to**.
9. In the **Criteria** field, enter **0**.

10. Click **Save**.

11. From the **Activity** folder, Drag and Drop the **Date Entered** field to the **Add** column.

12. From the **Operator** dropdown, select **Is Greater than or Equal to**.

13. In the **Criteria** field, enter **05/28/2024**.

- This date for this field should be changed to a reasonable range to test the function dependent on the DB being used.

14. Click **Save**.

15. Select the **Output** tab.

16. From the **Activity** Folder, add the following fields:

- Date Entered
- Activity Count (THIS field is the Calculated field)

17. From the **Donor** Folder, add the following fields:

- Full Name

18. Leave the **Do Not Aggregate Results** toggle unselected.

- This effectively means results WILL be Aggregated.
- This toggle defaults as unselected in every new query.

The screenshot displays a query builder interface. On the left, under 'Selected Outputs', a tree view shows 'Date Entered' selected. The main area contains a 'Do Not Aggregate Results' toggle switch, which is currently turned on (indicated by a blue circle) and is highlighted with a red box. Below this, there are radio buttons for 'Sort Fields' (selected) and 'Cross Tab Fields'. Five rows of field selection controls are visible, each with a dropdown menu labeled 'Field One' through 'Field Five' and a sorting option (Ascending or Descending) with a radio button. All 'Ascending' radio buttons are selected.

19. Click on the **Sample Results** button.

20. Observe **Sample Results** - Aggregation occurs and **SELECTED** Activity Counts equal 2 for Donors with more than one Activity recorded during date period.

Query Results

Query Name: Do Not Aggregate Results EXAMPLE
Query Owner: doconnell@wearemoore.com
Result Count: Displaying top 200 as sample result.
Execution Time: 00:00:00.0100522
Query Criteria: **Activity Count** Is Greater than or Equal to "0" AND **Date Entered** Is Greater than or Equal to "05/28/2024"

Date Entered	Full Name	Activity Count
05/28/2024	Mr. Tina Junior MD	2
05/28/2024	Frank Giaquinto	2
05/28/2024	Nathanael Laney Nathaniel	2
05/28/2024	Mrs. Cohen Jaylin	2
05/28/2024	Dana Ulises	2
05/28/2024	Colten Harley	2
05/28/2024	Ms. Jaime Alexandra Harper	1
05/28/2024	Mrs. Jaidyn Dylan	1
05/28/2024	Ms. Kayla Gael	1
05/28/2024	Benny Keshawn	1
05/28/2024	Mr. Davian Payton	1
05/28/2024	Bella Garret	1
05/28/2024	Mr. Devin Keanu	1
05/28/2024	Mrs. Troy Tabitha	1

21. Close the **Sample Results**.

22. Return to the **Output** tab.

23. Select the **Do Not Aggregate Results** toggle.

- This effectively means results WILL NOT be Aggregated.

The screenshot shows a configuration panel for a query. On the left, under 'Selected Outputs', are 'Date Entered', 'Full Name', and 'Activity Count'. On the right, the 'Do Not Aggregate Results' toggle is turned on (indicated by a blue circle). Below this, there are radio buttons for 'Sort Fields' (selected) and 'Cross Tab Fields'. Five rows are shown, each with a dropdown menu for a field (Field One to Field Five) and radio buttons for 'Ascending' (selected) and 'Descending' sorting options.

24. **Save** the Query. If not saved, aggregation change will not execute.

25. Click on the **Sample Results** button.

26. Observe **Sample Results** - Aggregation does NOT occur. ALL Activity Counts equal 1 as ALL Donors Activities are recorded separately during date period.

Query Results

Query Name: Do Not Aggregate Results EXAMPLE
Query Owner: doconnell@wearemoore.com
Result Count: Displaying top 200 as sample result.
Execution Time: 00:00:00.0100090
Criteria: **Activity Count** Is Greater than or Equal to "0" AND **Date Entered** Is Greater than or Equal to "05/28/2024"

Date Entered	Full Name	Activity Count
05/28/2024	Ms. Shaniya Cheyenne Kayden	1
05/28/2024	Mrs. Robert Logan Joy	1
05/28/2024	Davion Kaci	1
05/28/2024	Soren Jordyn	1
05/28/2024	Delaney Fletcher	1
05/28/2024	Mallory Vance	1
05/28/2024	Mr. Anaya Carmen	1
05/28/2024	Trevor Gabriella	1
05/28/2024	Mrs. Amari Gage	1
05/28/2024	Dayana Kalyn	1
05/28/2024	Lacey Kelvin	1
05/28/2024	Jaylen Joselyn	1
05/28/2024	Ms. Rhea Camden	1
05/28/2024	Kendall Nikhil Jonathan	1

Commonly Used Queries

The following section will provide overviews and steps for building queries that address specific, but commonly used, functions and query builds in the CRM.

Using OR Statements in Queries

When setting up Criteria for a Query, users have the ability to define the relationships for the filter criteria that they Add.

They can choose to define the relationship between criteria as an:

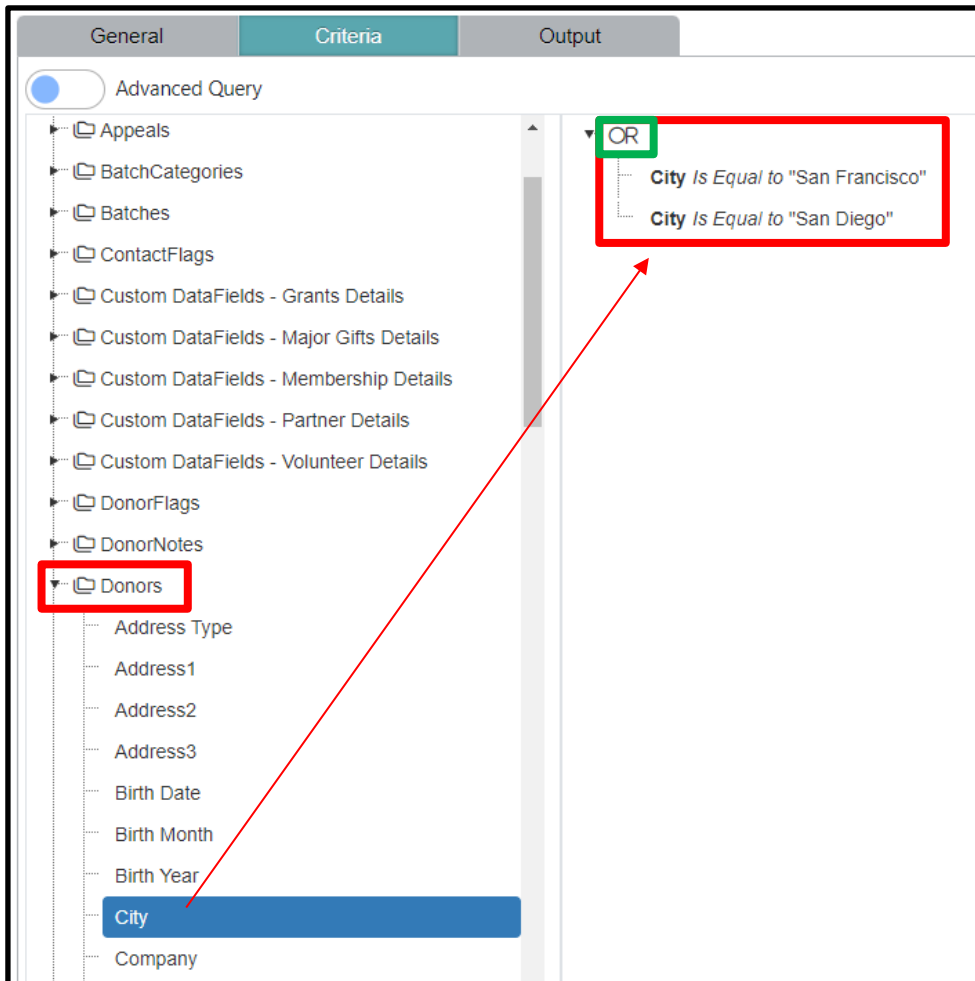
- **AND** – Display results that meet criteria for this filter **AND** that filter.
 - Show me Donors that Donated to Appeal X AND to Appeal Y.
 - Donor would have had to donate to both to be listed.
- **OR** – Display results that meet the criteria for this filter **OR** that filter.
 - Show me a list of Donors that have Donated to Appeal X OR Appeal Y.
 - Donor could have had to donate to one or another or both to be listed.

Users can also choose to use these filters in combination with each other. In the section below, users will be shown examples of OR Statements used by themselves and then in more complex arrangements with AND Statements.

NOTE: When building a Query in the Aegis CRM, users should ALWAYS add the AND statements FIRST. This enables the query logic to function accurately. Users should NOT put OR statements first.

EXAMPLES of OR statements used in criteria are:

All Donors by City in San Francisco OR San Diego.



Results display all donors that live in either city.

All Gifts by Year Received of 2024 AND Month Received of January OR Month Received of May.

The screenshot displays an 'Advanced Query' interface with three tabs: 'General', 'Criteria', and 'Output'. The 'Criteria' tab is active. On the left, a tree view shows the 'Gifts' table selected. The 'Criteria' pane on the right contains the following conditions:

- Year Received Is Equal to "2024"
- OR
- Month Received Is Equal to "January"
- Month Received Is Equal to "May"

Red boxes highlight the 'Gifts' table in the tree view, the 'Year Received' field, the 'Month Received' field, and the 'OR' operator. Red arrows point from the 'Month Received' and 'Year Received' fields in the tree view to their respective criteria in the right pane.

Results display all Gifts given in 2024 that were in the month of January or May; helpful for comparing non-consecutive months.

All Activity with an Activity Value of 10+ AND a Year Received of 2024 OR 2022 AND Month Received of January OR Month Received of May.

The screenshot shows a query builder interface with three tabs: General, Criteria, and Output. The 'Criteria' tab is active. On the left, a list of fields is shown, with 'Activity Value', 'Month Received', and 'Year Received' highlighted with red boxes. On the right, the query logic is displayed. It starts with an '&' symbol, followed by a dropdown arrow pointing to 'Activity Value Is Greater than or Equal to "10"'. Below this is an 'OR' operator, followed by two dropdown arrows pointing to 'Year Received Is Equal to "2024"' and 'Year Received Is Equal to "2022"'. Below these is another 'OR' operator, followed by two dropdown arrows pointing to 'Month Received Is Equal to "January"' and 'Month Received Is Equal to "May"'. Red arrows point from the highlighted fields on the left to their respective criteria in the query logic.

Results display a list of users that gave in the Year 2024 OR 2022 in the months of January OR May with a total Activity value greater than \$10.

Building OR Statements in Queries STEPS

In this section users will learn how to build the previously presented OR examples:

- All **Donors** by **City** in **San Francisco** OR **San Diego**.
- All **Gifts** by **Year Received** of **2024** AND **Month Received** of **January** OR **Month Received** of **May**.
- All **Activity** with an **Activity Value** of **10+** AND a **Year Received** of **2024** OR **2023** AND **Month Received** of **January** OR **Month Received** of **May**.

Query 1 (OR) Build: All **Donors** by **City** in **San Francisco** OR **San Diego**.

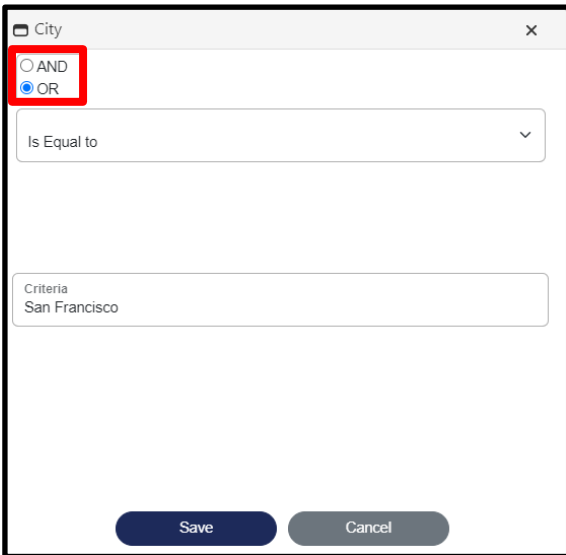
1. Click on the **Queries Module**>**New Query** sub-module.
2. In the **Name** field, enter **All Donors in San Francisco OR San Diego**.
3. From the **Query Type** dropdown, select **Gifts**.
4. Click on the **Criteria** tab.
5. Expand the **Donor** folder.
6. Drag and Drop the **City** field to the selection column.
7. Keep **Is Equal to** as the Operator.
8. In the **Criteria** field, enter **San Diego**.
9. Click **Save**.

10. Drag and Drop the **City** field to the selection column (second time).

11. Change the **AND/OR** selector to **OR**.

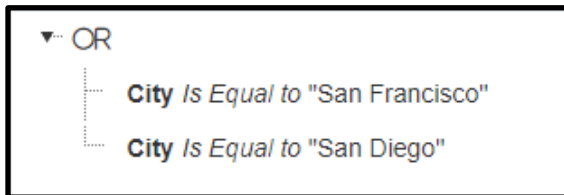
12. Keep **Is Equal** as the Operator.

13. In the **Criteria** field, enter **San Francisco**.



A screenshot of a dialog box titled "City". At the top left, there are two radio buttons: "AND" (unselected) and "OR" (selected). A red rectangular box highlights the "OR" radio button. Below the radio buttons is a dropdown menu showing "Is Equal to". Underneath that is a text input field containing "San Francisco". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

14. Click **Save**.



A screenshot of a filter rule configuration. At the top, there is a dropdown menu showing "OR". Below it, there are two criteria listed: "City Is Equal to "San Francisco"" and "City Is Equal to "San Diego"". The criteria are connected by a bracket on the left side.

15. Click on the **Output** tab.

16. Expand the **Donor** folder.

17. Drag & Drop the **City & Full Name** fields to the **Selected Outputs** column.

18. Expand the **Gifts** folder.

19. Drag & Drop the **Date Received & Gift Value** fields to **Selected Outputs** column.

20. From the **Sort Fields** section, select **City** from the **Field One** dropdown.

21. Click **Save**.

22. Click the **Sample Results** button.

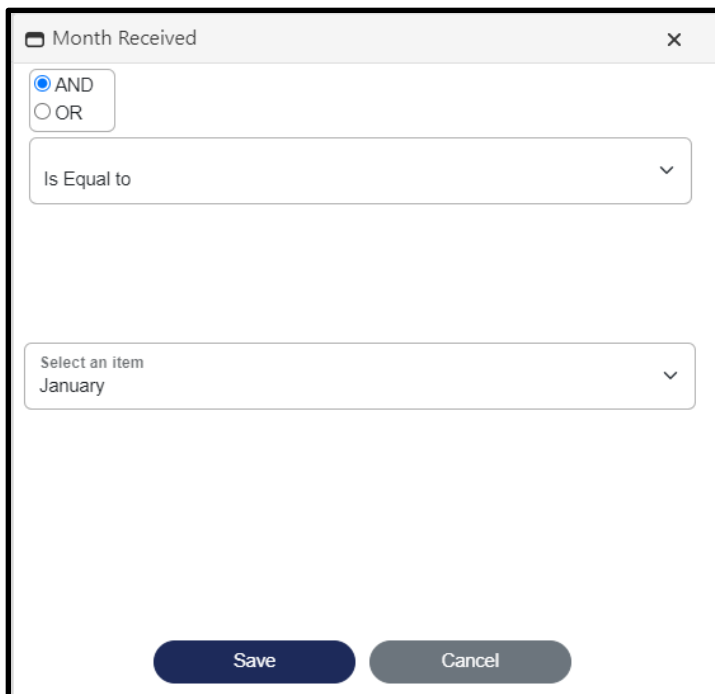
23. **Observe** the results.

Query Name: All Donors in San Francisco or San Diego
Query Owner: doconnell@wearemoore.com
Result Count: 74
Execution Time: 00:00:00.0500496
Query Criteria: City Is Equal to "San Diego" OR
City Is Equal to "San Francisco"

Date Received	Full Name	City	Gift Value
03/18/2024	Lamont Marlee	San Diego	\$12.50
03/05/2024	Mr. Galilea Bernardo Jair Jr.	San Diego	\$5.00
03/05/2024	Mr. Arlene Emilio Jordan	San Diego	\$25.00
03/11/2021	Jonathan Jackeline	San Diego	\$25.00
04/11/2022	Jonathan Jackeline	San Diego	\$25.00
05/11/2022	Jonathan Jackeline	San Diego	\$25.00
06/11/2022	Jonathan Jackeline	San Diego	\$25.00
07/11/2020	Jonathan Jackeline	San Diego	\$25.00
08/11/2023	Jonathan Jackeline	San Diego	\$25.00
09/11/2023	Jonathan Jackeline	San Diego	\$25.00
10/11/2022	Jonathan Jackeline	San Diego	\$25.00
11/11/2020	Jonathan Jackeline	San Diego	\$25.00
12/11/2023	Jonathan Jackeline	San Diego	\$25.00
01/11/2021	Jonathan Jackeline	San Diego	\$25.00
02/11/2022	Jonathan Jackeline	San Diego	\$25.00
03/11/2023	Jonathan Jackeline	San Diego	\$25.00
04/11/2020	Jonathan Jackeline	San Diego	\$25.00
05/11/2023	Jonathan Jackeline	San Diego	\$25.00
06/11/2023	Jonathan Jackeline	San Diego	\$25.00
07/11/2022	Jonathan Jackeline	San Diego	\$25.00
08/11/2021	Jonathan Jackeline	San Diego	\$25.00
09/11/2023	Jonathan Jackeline	San Diego	\$25.00
10/11/2021	Jonathan Jackeline	San Diego	\$25.00
11/11/2023	Jonathan Jackeline	San Diego	\$25.00
01/11/2020	Jonathan Jackeline	San Diego	\$25.00
12/11/2022	Jonathan Jackeline	San Diego	\$25.00
01/11/2024	Jonathan Jackeline	San Diego	\$40.00
05/18/2024	Mr. Cadence Chase Alexandria	San Diego	\$50.00
01/16/2024	Cmdr. Will Riker	San Francisco	\$123.60
03/11/2021	Mr. Diya Quinn Aaron	San Francisco	\$50.00
04/11/2020	Mr. Diya Quinn Aaron	San Francisco	\$50.00
05/11/2022	Mr. Diya Quinn Aaron	San Francisco	\$50.00
06/11/2020	Mr. Diya Quinn Aaron	San Francisco	\$50.00

Query 2 (OR) Build: All 2024 Gifts Received in January and May

1. Click on the **Queries Module>New Query** sub-module.
2. In the **Name** field, enter **All 2024 Gifts Received in January and May.**
3. From the **Query Type** dropdown, select **Gifts.**
4. Click on the **Criteria** tab.
5. Expand the **Gifts** folder.
6. Drag and Drop the **Year Received** field to the selection column.
7. Keep **Is Equal to** as the Operator.
8. From the **Criteria** drop down, select **2024.**
9. Click **Save.**
10. Drag and Drop the **Month Received** field to the selection column.
11. Keep **Is Equal** as the Operator.
12. From the **Criteria** drop down, select **January.**



The screenshot shows a dialog box titled "Month Received" with a close button (X) in the top right corner. Inside the dialog, there are two radio buttons for logical operators: "AND" (selected) and "OR". Below the operators is a dropdown menu showing "Is Equal to". Further down is another dropdown menu with the text "Select an item" and "January" visible. At the bottom of the dialog are two buttons: "Save" and "Cancel".

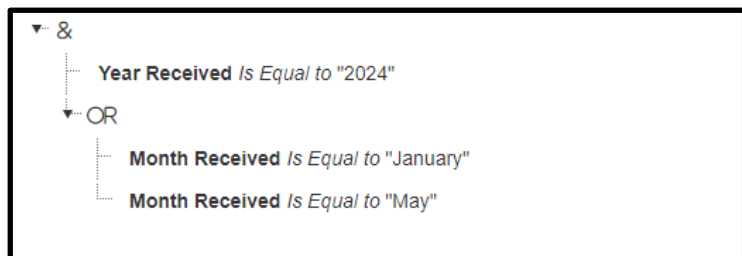
13. Drag and Drop the **Month Received** field to the selection column (second time).

14. Confirm the **AND/OR** selector is set to **OR**.

15. Keep **Is Equal** as the Operator.

16. From the **Criteria** drop down, select **May**.

17. Click **Save**.



18. Click on the **Output** tab.

19. Expand the **Donor** folder.

20. Drag & Drop the **Full Name** fields to the **Selected Outputs** column.

21. Expand the **Gifts** folder.

22. Drag & Drop **Month Received & Gift Value** fields to **Selected Outputs** column.

23. From the **Sort Fields** section, select **Month Received** from **Field One** dropdown.

24. Click **Save**.

25. Click the **Sample Results** button.

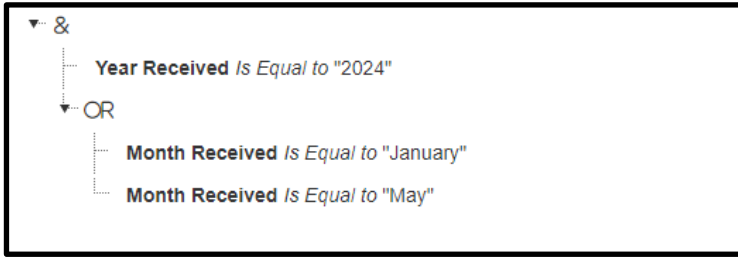
26. **Observe** the results.

Query Results		
Query Name:	All 2024 Gifts Received in January and May.	
Query Owner:	doconnell@wearemoore.com	
Result Count:	Displaying top 200 as sample result.	
Execution Time:	00:00:00.0200532	
Query Criteria:	Year Received Is Equal to "2024" AND (Month Received Is Equal to "" OR Month Received Is Equal to "")	
Month Received	Full Name	Gift Value
January	Jazmine Candace	\$5,500.00
January	Jamie Jordan	\$10.00
January	Ms. Sharon Mollie Alejandra	\$20.00
January	Evan Davian Derrick Mr.	\$60.00
January	Ms Aubrie Makenzie	\$60.00
January	Mrs. Campbell Eric	\$15.00
January	Victoria Semaj	\$15.00
January	Ms. Esteban Taya	\$15.00
January	Ms. Jaden Aubree	\$20.00
January	Yvette Stephany Carina	\$20.00
January	Mr. Mackenzie Dalton	\$20.00
January	Zachariah Gael Hadley	\$20.00
January	Celeste Tamara	\$55.00
May	Rey Guy	\$19.00
May	Stephany Octavio	\$32.00
May	Cassandra Jerry	\$32.00
May	Davion Kaci	\$55.00
May	Mark Sophie	\$17.75
May	Izaiah Tomas	\$42.00
May	Tanya Miah Gia	\$75.00
May	Ms. Kendall Sophie	\$10.50
May	Gracie Taliyah	\$10.50
May	Mrs. Elizabeth Anita	\$10.50
May	Ms. Jessie Judith	\$10.50
May	Kaelyn Ezekiel	\$25.00
May	Vicente Jeffery Gianni	\$35.00
May	Kayden Tamyia Sr.	\$150.00
May	Andy Taylor	\$20.00

Query 3 (OR) Build: All 2024 & 2022 in January & May - Activity of \$10+

1. Click on the **Queries Module>New Query** sub-module.
2. In the **Name** field, enter **All 2024 Gifts Received in January and May.**
3. From the **Query Type** dropdown, select **Activity.**
4. Click on the **Criteria** tab.
5. Expand the **Activity** folder.
6. Drag and Drop the **Activity Value** field to the selection column.
7. From the **Operator** drop down, select **Is Greater than or Equal to.**
8. In the **Criteria** field, enter **10.**
9. Click **Save.**
10. Drag and Drop the **Year Received** field to the selection column.
11. Keep **Is Equal** as the Operator.
12. From the **Criteria** drop down, select **2024.**
13. Drag and Drop the **Year Received** field to the selection column (second time).
14. Confirm the **AND/OR** selector is set to **OR.**
15. Keep **Is Equal** as the Operator.
16. From the **Criteria** drop down, select **2022.**
17. Click **Save.**

18. Criteria should appear as screenshot with progress made:



19. Drag and Drop the **Month Received** field to the selection column **BUT drop it on the & symbol** at the top - NOT in the white space/NOT on the Year Received.

20. Keep **Is Equal** as the Operator.

21. From the **Criteria** drop down, select **January**.

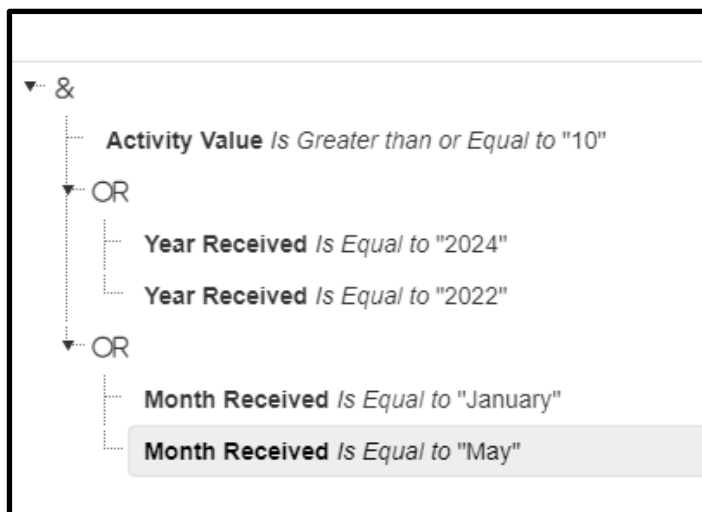
22. Drag and Drop the **Month Received** field to the selection column (second time).

23. Confirm the **AND/OR** selector is set to **OR**.

24. Keep **Is Equal** as the Operator.

25. From the **Criteria** drop down, select **May**.

26. Click **Save**.



27. Click on the **Output** tab.
28. Expand the **Donor** folder.
29. Drag & Drop the **Full Name** fields to the **Selected Outputs** column.
30. Expand the **Activity** folder.
31. Drag & Drop **Activity Value & Month/Year Received** to **Selected Outputs**.
32. From **Sort Fields**, select **Month/Year Received** from **Field One** dropdown.
33. Click **Save**
34. Click the **Sample Results** button.
35. **Observe** the results.

Query Results		
Query Name:	All 2024 & 2022 in January & May - Activity of \$10+	
Query Owner:	doconnell@wearemoore.com	
Result Count:	Displaying top 200 as sample result.	
Execution Time:	00:00:00.0199897	
Query Criteria:	Activity Value Is Greater than or Equal to "10" AND (Year Received Is Equal to "2024" OR Year Received Is Equal to "2022") AND (Month Received Is Equal to "January" OR Month Received Is Equal to "May")	
Month/Year Received	Activity Value	Full Name
Jan 2024	\$5,000.00	Mr Ignacio Addyson Kadin
Jan 2024	\$2,500.00	Tyrell Brianne
Jan 2024	\$500.00	Mr. Zaire Bianca
Jan 2024	\$500.00	Katrina Braulio
Jan 2024	\$500.00	Mr. Alaina Orlando Arielle
Jan 2024	\$500.00	Mr. Aron Bailee
Jan 2024	\$41.20	Gracie Iyanna
Jan 2024	\$25.75	Helena Carissa
Jan 2024	\$123.60	Janiah Adrianna
Jan 2024	\$175.00	Ruth Inoa
Jan 2024	\$51.50	Ismael Brandon
Jan 2024	\$300.00	Mr. Chaz Chasity
Jan 2024	\$100.00	Mr. Braulio Arjun Chandler
Jan 2024	\$25.00	Meadow Kayleigh
Jan 2024	\$100.00	Lamar Sonia Miracle
Jan 2024	\$50.00	Mr. Gordon Charlize
Jan 2024	\$50.00	Ms. Delaney Skyler
Jan 2024	\$51.50	Mr. Kyleigh Lisette
Jan 2024	\$25.00	Ms. Mariana Judith
Jan 2024	\$20.00	Alonso Krystal Emma
Jan 2024	\$10.00	Carolina Kadin Emilee
Jan 2024	\$10.00	Johan Elvin
Jan 2024	\$25.00	Janice Smith
Jan 2024	\$10.00	Mr. Dillan Korbin
Jan 2024	\$103.00	Marina Shawn

Using an Existing Query within a New Query (With Queries)

Enable users to leverage existing queries as filters inside of other queries. This can be especially helpful when attempting to finalize a list of contacts that have engaged in more than one activity; were mailed differing Solicitations, responded to multiple Appeals, were mailed multiple Acknowledgements, etc. where the results the user needs is one, consolidated Query that acts as a Contact List.

With the exception of a Contacts query being leveraged inside another Contacts Query – see the First Scenario below - users should **NOT** attempt to use the same query type within another query; for instance, using an Activities query inside of another Activities query would not work.

In the Steps on the following pages, users will see how this function works over the build of TWO Separate Scenarios:

FIRST SCENARIO

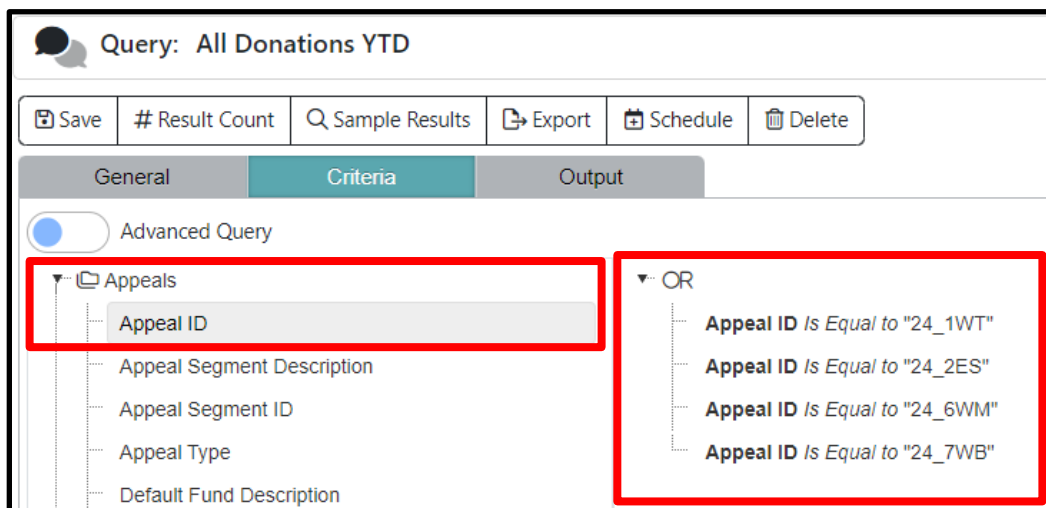
Goal of this scenario is to create a list of Donors that have contributed to one or more Appeals in the last year. The First Query of Gifts will produce a list of the Donors who have contributed to the last year but may have duplicates. The Second Query of Contacts will filter the first query list so that we only get one name, whether the person gave one or more times. The third query duplicates the second query but adds the No Contact Mail Flag as criteria.

- **First Query: All Donations YTD** - Query Type of **Gifts** resulting in listing of ALL Donors to ALL Appeals Year to Date (YTD). Because this query is done from Gifts, it may include the same individual donor listed multiple times if they gave to multiple Appeals. This Query functions as the “template” query leveraged in the following two queries
- **Second Query: All Donors YTD** - Query Type of **Contacts** that includes the first query as a query within this query. Creates an accurate count of all Donors (via Contacts) that have contributed to ANY Appeal YTD. Because query created from Contacts, it eliminates duplicate present in first query.
- **Third Query - All Donors YTD - NO Direct Mail Flag** - Query Type of **Contacts** (again) including the first query as a query within this query (again). Includes Additional criteria of No Contact Mail Flag selection from Donor record. Creates an accurate count of Contacts NOT to be directly contacted via Mail from all Appeals YTD.

Using an Existing Query within a New Query STEPS I

First Query: All Donations YTD

1. Click on the **Queries Module>New Query** sub-module.
2. In the **Query Name** field, enter **All Donations YTD**.
3. From the **Query Type** dropdown, select **Gifts**.
4. Click on the **Criteria** tab.
5. Expand the **Appeals** folder.
6. Drag and Drop the **Appeal ID** field to the selection column.
7. From the **Operator** drop down, select **Is Equal to**.
8. In the **Criteria** field, enter **24_1WT**.
 - Users should substitute Appeal ID(s) from their system.
9. Click **Save**.
10. REPEAT **Steps 6-9** for as many **Appeal IDs** as desired.
 - Purpose is to create a “baseline” query – a type of template – that contains ALL Appeals Year to Date in one Query.
 - This query is maintained to include any new Finalized Appeals as leverageable values for this query as a query within other queries.
11. **IMPORTANT** – ensure **OR** is selected at top of each criteria filter submission.

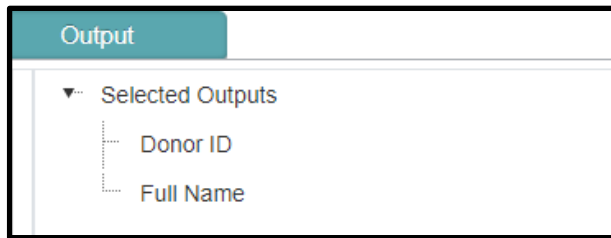


12. Click on the **Output** tab.

13. Expand the **Donor** folder.

14. Drag & Drop the **Donor ID & Full Name** fields to the **Selected Outputs** column.

- Since this Query is acting as a type of filter for other queries, it is not necessary to build out the Output tab as it will not be inherited.



15. Click **Save**.

16. **Save** the Query.

17. Click the **Sample Results** button.

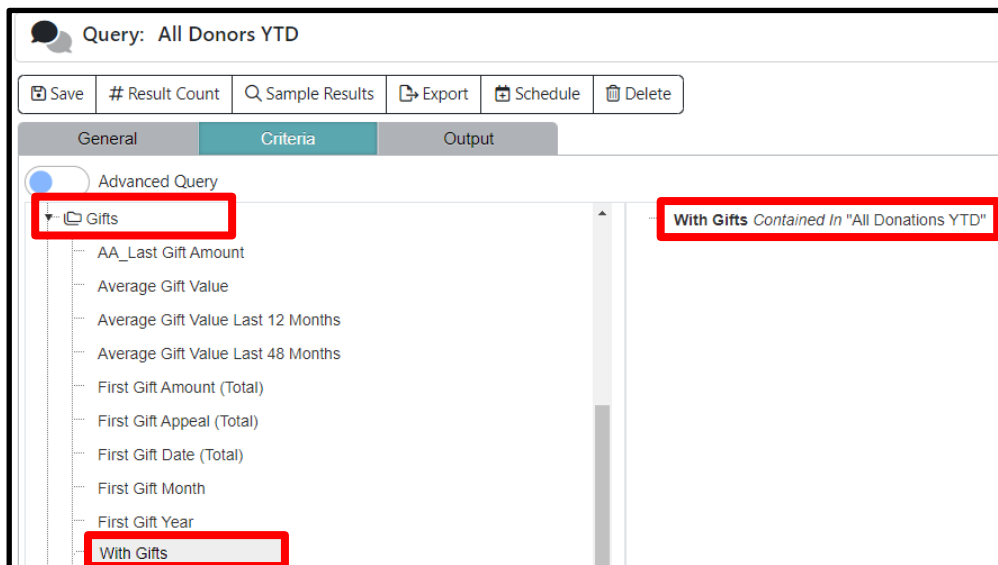
18. **Observe** the results.

19. Click the **Results Count** button.

20. **Record the Count #** for comparison.

Second Query: All Donors YTD

1. Click on the **Queries Module**>**New Query** sub-module.
2. In the **Query Name** field, enter **All Donors YTD**.
3. From the **Query Type** dropdown, select **Contacts**.
4. Click on the **Criteria** tab.
5. Expand the **Gifts** folder.
6. Drag and Drop the **With Gifts** field to the selection column.
7. From the **Operator** drop down, select **Contained In**.
8. In the **Criteria** field, select **All Donations YTD** from the dropdown.
 - This is where the user is selecting the “Query within the Query”.



9. Click **Save**.
21. Click on the **Output** tab.
22. Expand the **Donor** folder.
23. Drag & Drop the **Donor ID, Full Name**, and any other desired fields to the **Selected Outputs** column.
24. Click **Save**.

25. **Save** the Query.

26. Click the **Sample Results** button.

27. **Observe** the results.

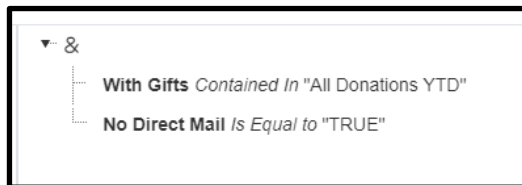
28. Click the **Results Count** button.

29. **Record the Count #** for comparison to the First Query.

- Should be less records due to the elimination of same donors giving to multiple Appeals.

Third Query: All Donors YTD - NO Direct Mail Flag

1. Click on the **Queries Module>Locate Query** sub-module.
 - We will be **COPYING** the All-Donors Query to create the third query.
2. In the **Name Contains** field, enter **All Donors YTD**.
3. Open the **Query**.
4. In **Query Name** field, amend text to read: **All Donors YTD – NO Direct Mail Flag**.
5. Click **Save**.
6. At the **Save** dialog box, select **Save As New**.
 - Copying a Query saves time with the setup of initial Criteria and Output.
7. Click on the **Criteria** tab.
8. Existing criteria filter of **With Gifts Contained In "All Donations YTD"** displays.
9. Click on the **Donors** folder.
10. Drag the **No Direct Mail** flag field to the selection column.
11. In the **Operator** dropdown, keep **Is Equal To** as the value.
12. In the **Select an Item** dropdown, keep **True** as the value.
13. Click **Save**.



14. **Save** the Query.
15. Click the **Sample Results** button.
16. **Observe** the results.
17. Click the **Results Count** button.
18. **Record the Count #** for comparison.
 - Should be less records due to the elimination of donors with No Direct Mail flag checked.

SECOND SCENARIO

Goal of this scenario is to create a list of Donors that have had any Activity in the past year AND been mailed a Solicitation for a specific Appeal. The First Query of Activity will produce a list of the Donors who have had some Activity in the last year but may have duplicates. The Second Query of Letters will create a list of all persons that have been mailed a Solicitation for a specific Appeal – the 23_1WT Appeal. The third query will leverage the first two queries as queries within that query to produce the list of All Donors that have given a gift in past year AND were solicited – mailed a letter – for the 23_1WT Appeal.

- **First Query: Donations Last 12 Months** - Query Type of **Activity** resulting in listing ALL Activity Year to Date (YTD). Because this query is done from Activity, it may include the same individual whose activity is listed multiple time. This Query functions as the FIRST “template” query leveraged in the third query.
- **Second Query: Solicitations for 23_1WT Appeal** - Query Type of **Letters** with criteria filter pointed specifically at the 23_1WT Appeal. Produces a count of all Donors that were solicited (mailed a letter) for them to contribute to the 23_1WT Appeal. This Query functions as the SECOND “template” query leveraged in the third query.
- **Third Query - Donors Solicited for Appeal 23_WT with Donation Last 12 Months** - Query Type of **Contacts**. Leverages the First and Second Queries as criteria using the With Activity and With Letters filters. Produces a list of all Donors that were solicited (mailed) for the 23_1WT Appeal and had some activity in the last 12 months.

Using an Existing Query within a New Query STEPS II

First Query: Donations for 2023

1. Click on the **Queries Module>New Query** sub-module.
2. In the **Query Name** field, enter **Donations for 2023**.
3. From the **Query Type** dropdown, select **Activity**.
4. Click on the **Criteria** tab.
5. Expand the **Activity** folder.
6. Drag and Drop the **Activity Date** field to the selection column.
7. From the **Operator** drop down, select **Is Greater than or Equal to**.
8. In the **Criteria** field, enter **12/01/2023**.
9. Click **Save**.
10. Click on the **Output** tab.
11. Expand the **Donor** folder.
12. Drag & Drop the **Donor ID & Full Name** fields to the **Selected Outputs** column.
 - Since this Query is acting as a type of filter for other queries, it is not necessary to build out the Output tab as it will not be inherited.
13. Click **Save**.
14. **Save** the Query.
15. Click the **Sample Results** button.
16. **Observe** the results.
17. Click the **Results Count** button.
18. **Record the Count #** for comparison.

Second Query: Solicitations for 23_1WT Appeal

1. In the **Query Name** field, enter **Solicitations for 23_1WT Appeal**
2. From the **Query Type** dropdown, select **Letters**.
3. Click on the **Criteria** tab.
4. Expand the **Appeal** folder.
5. Drag and Drop the **Appeal ID** field to the selection column.
6. From the **Operator** drop down, select **Is Equal to**.
7. In the **Criteria** field, enter **23_1WT**.
8. Click **Save**.
19. Click on the **Output** tab.
20. Expand the **Donor** folder.
21. Drag & Drop the **Donor ID**.
22. Click **Save**.
23. **Save** the Query.
24. Click the **Sample Results** button.
25. **Observe** the results.
26. Click the **Results Count** button.
27. **Record the Count #** for comparison.

Third Query: Donors Solicitated for Appeal 23_WT with Donation Last 12 Months

1. In the **Query Name** field, enter **Donors Solicitated for Appeal 23_WT with Donation Last 12 Months**
2. From the **Query Type** dropdown, select **Contacts**.
3. Click on the **Criteria** tab.
4. Expand the **Activities** folder.
5. Drag and Drop the **With Activities** field to the selection column.
6. From the **Operator** dropdown, select **Contained In**.
7. From the **Select an item** drop down, select **Donations for 2023**.
 - The FIRST “Query within the Query”.
8. Click **Save**.
9. Expand the **Letters** folder.
10. Drag and Drop the **With Letters** field to the selection column.
11. From the **Operator** dropdown, select **Contained In**.
12. From the **Select an item** drop down, select **Solicitations for 23_1WT Appeal**.
 - The SECOND “Query within the Query”.
13. Click **Save**.
28. Click on the **Output** tab.
29. Expand the **Donor** folder.
30. Drag & Drop the **Donor ID** and Full Name fields.
31. Click **Save**.
32. **Save** the Query.
33. Click the **Sample Results** button.
34. **Observe** the results.

35. Click the **Results Count** button.

36. **Record the Count #** for comparison.

Unique Tables

There are two tables within query types that users should be aware of that enable faster and more efficient pulling of Donor level data in queries - **Nightly Calculated Fields** and **Functions**.

Nightly Calculated Fields

The **Contacts** query type, **Nightly Calculated Fields** folder (table) contains **46** values under the **Criteria** and **Output** tabs. These fields are updated each night.

The **Activity** query type, **Nightly Calculated Fields** folder (table) contains **4** calculated fields under the **Criteria** tab, and **6** values under the **Output** tab. These fields are updated each night.

When user selects one of the **Nightly Calculated Fields** values for use in the **Criteria** or **Output** tabs, the advantage is two-fold:

1. **Easier to Find:** Groups calculated fields spread among Contacts & Activities joined tables for under one Nightly Calculated Fields table for easier access.
2. **Faster Speed:** It displays data faster by leveraging already processed calculations conducted during the previous last night's update.

What are calculated fields? Calculated fields contain values resulting from simple math operations, or conditional operations, such as greater than or if-else, and many others. Some examples of Contact query type Calculated fields:

- **CurrentYearGiftCount** – From Output tab calculates and displays an individual Contacts current year's gift count total. Usually used in Output with the Donor ID or Full Name.
- **Last Gift Amount** – From Output tab displays an individual Contacts last gift amount. Usually used in Output with the Donor ID or Full Name.

NOTES:

- Calculated fields specifically built for the client's environment will NOT display under the Nightly Calculated Fields folder, **only stock, Aegis CRM** calculated fields will appear.
- IF a user needs data current to actual time/day, they should use the Calculated fields from their location in each individual tables, and not the Nightly Calculated table fields.
- For a complete list of the stock Aegis Calculated fields spread among all Query Types, refer to **APPENDIX B: Calculated Fields by Query Type** in this manual.

Screen shots of the **46 Contacts** and **6 Activities** Nightly Calculated Fields from the Output tabs of Contacts and Activities:

Contacts

Nightly Calculated Fields	
.....	CurrentYearGiftCount
.....	CurrentYearRevenue
.....	Difference of Last Gift and Current Gift Amount
.....	FirstGiftAppeal
.....	FirstGiftDate
.....	FirstGiftValue
.....	Largest Gift Appeal
.....	Largest Gift Fund
.....	Largest Gift Payment Method
.....	LargestGiftDate
.....	LargestGiftValue
.....	Last Gift Amount
.....	Last Gift AppealID
.....	Last Gift Fund
.....	Last Gift Payment Type
.....	Last Previous Gift Amount
.....	Last Previous Gift Date
.....	LastGiftDate
.....	LastGiftValue
.....	LastInvoiceDate
.....	LifetimeAvgGift
.....	LifetimeCost
.....	LifetimeGiftCount
.....	LifetimeNet

.....	LifetimeNet
.....	LifetimeProductRevenue
.....	LifetimeTotalRevenue
.....	Single Largest Donation
.....	Single Largest Donation Date L24 (Total)
.....	Single Largest Donation L24 (Total)
.....	SmallestGiftValue
.....	Sum of Gifts Last 12 Months
.....	Sum of Gifts Last 12 to 24 Months
.....	Sum of Gifts Last 18 Months
.....	Sum Of Gifts Last 24 Months
.....	Sum of Gifts Last 25 to 36 Months
.....	Sum of Gifts Last 36 Months
.....	Sum of Gifts Last 6 Months
.....	Total Gifts Last 12 Months
.....	Total Gifts Last 24 Months
.....	Total Gifts Last 36 Months
.....	Total Gifts Last 6 Months
.....	TotalGiftCountCurrentMonth
.....	TotalGiftCountLastMonth
.....	TotalGiftValue
.....	TotalRevenueCurrentMonth

Activities

Nightly Calculated Fields	
.....	FirstGiftDate
.....	FirstGiftValue
.....	Last Gift Appeal
.....	Last Gift Date
.....	Last Gift Value
.....	Lifetime Single Largest Activity Value

Summary Results using a **Contacts** query type with **Nightly Calculated Fields** values under the **Output** tab:

- **Donor ID** and **Full Name** were added for context – ALL other fields are from the Nightly Calculated Fields table.

Query Results								
<p>Query Name: Nightly Calculated Fields Example Query Owner: doconnell@wearemoore.com Result Count: 28 Execution Time: 00:00:00.0151239 Query Criteria: State Is Equal to "RI"</p>								
Donor ID	Full Name	CurrentYearGiftCount	CurrentYearRevenue	Difference of Last Gift and Current Gift Amount	FirstGiftAppeal	FirstGiftDate	FirstGiftValue	Largest Gift Appeal
40021266	Mrs. Ashlee Destin	1	\$25.00	\$0.00	Aegis 2017	01/13/2022	\$25.00	Aegis 2017
40668957	Mr. Devan Makayla	8	\$400.00	\$0.00	OCFFP0309	05/14/2009	\$5.00	Aegis 2017
40021247	Mr. and Mrs. Catalina Cesar	7	\$350.00	\$0.00	OC112	10/22/2007	\$5.00	Aegis 2017
40020968	Mr. Koda Iris	7	\$350.00	\$0.00	Aegis 2017	03/07/2022	\$50.00	Aegis 2017
40001494	Ivy Melanie	7	\$350.00	\$0.00	DEFAULT	03/26/2004	\$10.00	Aegis 2017
40002032	Mr. and Mrs. Kasey Hope Jr.	0	\$0.00	\$200.00	DEFAULT	03/24/2004	\$100.00	OC3IC0409

Largest Gift Fund	Largest Gift Payment Method	LargestGiftDate	LargestGiftValue	Last Gift Amount	Last Gift AppealID	Last Gift Fund	Last Gift Payment Type	Last Previous Gift Amount	Last Previous Gift Date	LastGiftDate
1234-001	CreditCard	12/13/2022	\$25.00	\$25.00	Aegis 2017	1234-001	CreditCard	\$25.00	12/13/2022	12/13/2022
1234-001	EFT	09/26/2022	\$50.00	\$50.00	Aegis 2017	1234-001	EFT	\$50.00	08/26/2022	09/26/2022
1234-001	EFT	09/20/2022	\$50.00	\$50.00	Aegis 2017	1234-001	EFT	\$50.00	08/20/2022	09/20/2022
1234-001	EFT	09/07/2022	\$50.00	\$50.00	Aegis 2017	1234-001	EFT	\$50.00	08/07/2022	09/07/2022
1234-001	EFT	09/03/2022	\$50.00	\$50.00	Aegis 2017	1234-001	EFT	\$50.00	08/03/2022	09/03/2022
4	Check	07/14/2009	\$300.00	\$300.00	OC3IC0409	1234-001	Check	\$100.00	09/10/2008	07/14/2009

Functions Fields

The **Contacts** query type, **Functions** folder (table) contains **20** values under the **Criteria** tabs and **3** under the **Output** tab.

Functions enable users to employ pre-made **Criteria** filters of the most commonly used “With” statements for a Contacts query type. “With” criteria statements function as quick pulls of data from another module, record, or linked field within Aegis, which relate to a Contacts (Donor). They enable users to create quick statements for Output such as, show me Contacts (Donors):

- With Donation To Appeal Group
- With Letter
- With Letter By Segment
- With Response to Appeal
- With SKU
- With State Code

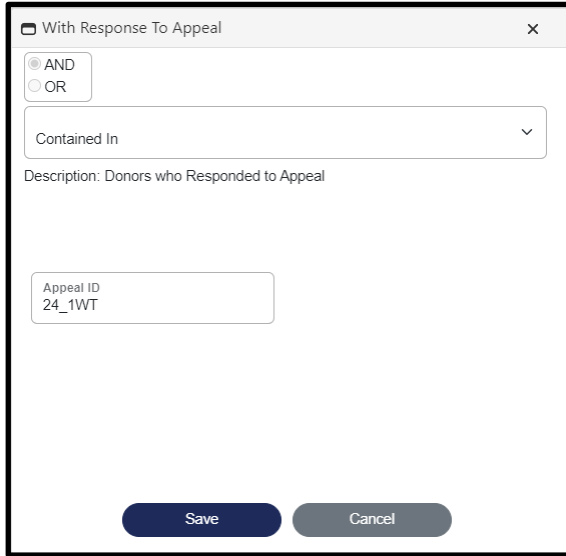
They can be used as one-off criteria statements for quick pulls of current data or can be used in conjunction with other criteria to build more complicated queries.

Functions based Criteria popups – the boxes that display once a field is dragged and dropped to the right-hand column under Criteria – have one or more fields to define the “With” of the criteria.

Creating a Contacts Query using Functions

1. Click on the **Queries Module>New Query** sub-module.
2. In the **Query Name** field, enter **Donors Responding to 24_1WT**.
 - Users should substitute their desired Appeal for 24_1WT
3. From the **Query Type** dropdown, select **Contacts**.
 - REMINDER: Functions table is ONLY available for Contacts query type
4. Click on the **Criteria** tab.
5. Expand the **Functions** folder.
6. Drag and Drop the **With Response to Appeal** field to the selection column.
7. From the **Operator** drop down, select **Contained In**.

8. In the **Appeal ID** field, enter **24_1WT**.



9. Click **Save**.

10. Click on the **Output** tab.

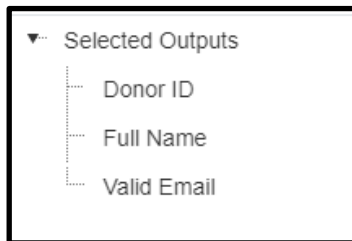
11. Expand the **Donor** folder.

12. Drag & Drop the **Donor ID & Full Name** fields to the **Selected Outputs** column.

13. Expand the **Functions** folder.

14. Drag & Drop the **Valid Email** field to the **Selected Outputs** column.

- The Valid Email field indicates via 0 or 1 in the results whether or not a Donor has a usable email for communications.



15. Click **Save**.

16. **Save** the Query.

17. Click the **Sample Results** button.

18. **Observe** the results – receive a list of Donors who responded to the Appeal.

- For more than 200 results, users need to Export the data.

APPENDIX A: Query Type Descriptions and Samples

Query Type	Description	Sample	Result Type
Contact Query	Group partners that have something in common.	Partners who live in Maine with an average gift of \$25 or higher	
Activity Query	Group records based on inbound activities including any that did not include a donation.	Partners who responded to a specific appeal, during a specific time frame, and made a pledge	
Gift Query	Group transaction records based on something they have in common.	Gifts given by specific appeal, during a specific time frame, and entered in a specific batch.	
Activity	Find information about inbound correspondence with your partners. Donations, orders, and non-zero-dollar responses are all included in the Activity Query Type.	Activity Value is greater than or equal to \$5 AND Activity Date is greater than or equal to 6/1/20XX	Gifts
Appeals	Find detailed information on appeals, such as acknowledgements, packages, grouping options, and general appeal status.	Appeal Date is greater than or equal to 6/1/20XX AND Active is equal to True AND Appeal Type is equal to Solicitation	Appeals
Appeal Segments	Find information on specific appeal segments such as Description, Mail Count, Segment Cost	Appeal ID is equal to OC3DV0408	Appeal Segments
Available Contact Flags	Contact Flags are custom fields added for your specific organization.	Flag Description is equal to Quarterly	Contact Flags
Batches	Find information on specific batches, such as Amount, Date, Type, Status, etc.	Batch Date is equal to 6/1/20XX AND Batch Status is equal to Reviewed	Batch Details
Campaign	Find gift information on a specific campaign, such as Date Gift Received, Gift Value	Campaign Name is equal to - _____	Gifts
Change History	Find information on changes made to contact records, such as an address and custom data field changes.	Date Changed is greater than or equal to 6/1/20XX AND Modified Property is equal to Address1	Contacts
Contacts	Find information on partner records in the database. This is also the query type used for Appeal Pulls.	Date Joined Is Greater than or Equal to 6/1/20XX AND Sum of Gifts in Last 12 Months is Greater than or Equal to \$5	Contacts
Day Deposits	Used in conjunction with the Day Closing function, this query type provides summary information on batch deposits.	Deposit Date is equal to 6/1/20XX	Deposit Details

Funds	Find gift information for a specific fund, or group of funds.	Fund ID is equal to 20XX Fund	Gifts
Gifts	Find information on non- zero-dollar, non-pledge transactions, such as Date Received, Batch Number, Appeal ID	Date Received is greater than or equal to 6/1/20XX AND Gift Value greater than/equal to \$100	Gifts
Inventory	Find information on inventory items, such as Location, Price, Fair Market Value, Reorder Levels	Active is equal to True	Inventory Items
Invoice Gifts	Find information based on donations only. No order or other non-donation transactions are included	Appeal ID is equal to _____ AND Gift Date is greater than or equal to 6/1/20XX	Gifts
Invoice Items	Find information about order transactions, such as SKU's , purchases, fair market value, etc.	SKU is equal to _____	Invoice Items
Invoices	Find information about order transactions, such as transaction totals, appeal trends, etc.	Appeal ID is equal to _____	Invoice Items
Fund Items	Find information related to Fund Items; transactions against, total revenue, etc.		
Letters	Find information based on solicitations, whether direct mail, telephone or email, with the exception of response or acknowledgement letters. This will return all constituents that receive the solicitation, whether they reply or not.	Appeal ID is equal to _____	Contacts
Outbound Activity	Find information based on response or acknowledgement appeals.	Appeal ID is equal to _____	Contacts
Packages	Find information on appeal packages, such as which packages are assigned to an appeal, costs and counts, etc.	Appeal ID is equal to _____	Gifts
Payments	Find information on what types of payment methods were used by constituents, such as Checks, Cash, Credit Cards, etc.	Payment Type is equal to Credit Card and Payment Date is greater than or equal to 6/1/20XX	Gifts
Pledges	Find information on pledges made by your partners, such as original appeal, income generated from pledge payments.	Date Pledged is greater than or equal to 6/1/20XX AND Active Pledge is equal to True	Pledges
RDD Assignments	Find giving information on Regional Development Director (RDD) assignments	RDD Name is equal to Planned Giving Officer AND Activity Date is greater than or equal to 6/1/20XX	Gifts
User Activity	Find information on specific user activities	Operation is equal to Create AND Time Stamp is greater than or equal to 6/1/20XX AND Category is equal to Activity	User Activity

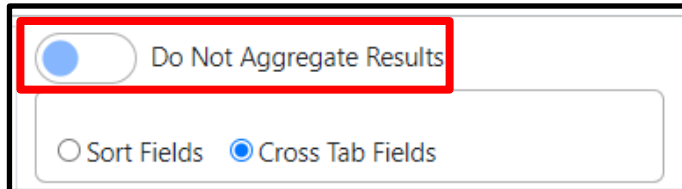
APPENDIX B: Calculated Fields by Query Type

With each **Query Type**, different calculated fields are available for aggregation (summation). To aggregate query results by using one or more of these fields, each desired calculation must be chosen as one of the **Selected Outputs** (fields dragged over to the right-hand column under Criteria in a Query).

Users can also break down calculated field totals into sub-totaled groups by selecting a **static field**. Any static field in available outputs can be used to group records and create subtotals.

Below is a color-coded list of each **Query Type**, sub grouped by the **Folder/Table**, which displays the individual calculated **Fields** available for aggregation.

Each calculated field listed below functions with the "**Do Not Aggregate Results**" check box found on the **Output** tab of a query. This box remains UNCHECKED by default. If checked, it would cease aggregation and would enable the individual counting of those values in the results.



Query Type: **Activity**

- **Activity Folder:**
 - **Activity Count:** Counts the number of activity records
 - **Average Activity Value:** Calculates the average activity amount (**Sum of Activity Value** divided by **Activity Count**) for the activity records
 - **Gift Count:** Counts the number of gift records captured by the query
 - **Number of Money Transactions:** Counts the number of activity records containing monetary values (gifts, purchases, refunds, event registrations, etc.)
 - **Number of No Money Transactions:** Counts the number of activity records not containing monetary values
 - **Number of Refunded Transactions:** Counts the number of activity records that were created as refunds for previous monetary transactions
 - **Result Count:** Counts the number of records
 - **Sum of Activity Value:** Adds up the **Activity Values**
- **Payments Folder:**
 - **Sum of Amount Received:** Adds up the total value of all payments received for the activities

Query Type: **AppealCosts**

- **Appeal Level Costs Folder:**
 - **Sum of Actual Cost:** Adds up the total **Fixed Appeal Cost** for all appeals
 - **Sum of Estimated Cost:** Adds up the total **Estimated Cost** (found under the **Appeal Costs** section of an appeal's **General** tab) for all appeals
 - **Sum of Quantity:** Adds up the values for **Total Quantity** (found under the **Appeal Costs** section of an appeal's **General** tab) for all appeals

Query Type: **Appeals**

- **Activity Folder:**
 - **Activity Count:** Counts the total number of activity records associated with the appeals
 - **Average Activity Value:** Calculates the average activity amount (**Sum of Activity Value** divided by **Activity Count**) for all activities associated with the appeals
 - **First Activity Date:** The minimum activity date recorded for activities associated with the appeals
 - **Last Activity Date:** The maximum activity date recorded for activities associated with the appeals
 - **Sum of Activity Value:** Adds up the **Activity Values** for activities associated with the appeals

- **Appeal Pulls Folder:**
 - **Last Finalized Date:** Returns the maximum **Finalized Date** for appeal pulls

- **Appeals Folder:**
 - **Item Count:** Counts the number of distinct appeals
- **Gifts Folder:**
 - **Average Gift Value:** Calculates the average gift amount (**Sum of Gift Value** divided by **Gift Count**) for gifts associated with appeals
 - **First Gift Date:** Returns the minimum gift date for gifts associated with appeals
 - **Gift Count:** Counts the number of gifts associated with appeals
 - **Last Gift Date:** Returns the maximum gift date for gifts associated with appeals
 - **Sum of Gift Value:** Adds up the gift amounts associated with appeals

Query Type: **AppealSegments**

- **Appeal Segments Folder:**
 - **Sum of Segment Cost:** Adds up the **Segment Costs** for appeal segments

Query Type: **AvailableContactFlags**

- **PartnerFlags Folder:**
 - **Partner Count:** Counts the number of partner records associated with flags

Query Type: **Batches**

- **Activity Folder:**
 - **Recorded Amount:** Adds up the activity amounts recorded within each batch
 - **Recorded Count:** Counts the total number of activities recorded within each batch

- **Batches Folder:**
 - **Sum of Batch Amount:** Adds up the transaction amounts recorded across all batches
 - **Sum of Batch Count:** Adds up the transaction amounts recorded across all batches

Query Type: **Bequests**

- **Activity Folder:**
 - **Sum of Gift Value:** Adds up the gift amounts associated with bequests

Query Type: **Campaigns**

- **Gifts Folder:**
 - **Sum of Gift Value:** Adds up the gift amounts associated with campaigns

Query Type: **Contacts**

- **Activity Folder:**
 - **Average Activity Value:** Calculates the average activity amount (**Sum of Activity Value** divided by **Activity Count**) for all activities associated with partners
 - **First Activity Date:** The minimum activity date, displayed as "dd/mm/yyyy" (i.e. 08/31/2010), associated with partners
 - **Last Activity Date:** The maximum activity date, displayed as "dd/mm/yyyy" (i.e. 08/31/2015), associated with
 - **Last Activity Date - Full Month and Year:** The maximum activity date, displayed as the full month and year (i.e. August 2015), associated with partners
 - **Sum of Activity Value:** Adds up the **Activity Values** associated with partners

- **Gifts Folder:**
 - **Average Gift Value:** Calculates the average gift amount (**Sum of Gift Value** divided by **Gift Count**) associated with partners
 - **Average Gift Value Last 12 Months:** Calculates the average gift amount for gifts received over the last 12 months (**Sum of Gift Last 12 Months** divided by **Total Gifts Last 12 Months**) associated with partners
 - **Average Gift Value Last 48 Months:** Calculates the average gift amount for gifts received over the last 48 months (the sum of all gifts received in the last 48 months divided by the total count of all gifts received in the last 48 months) associated with partners
 - **First Gift Year:** The minimum gift date, displayed as "yyyy" (i.e. 2010), associated with partners
 - **Gift Count:** Counts the number of gifts associated with partners
 - **Maximum Gift Value:** Displays the single largest gift amount recorded for partners
 - **Minimum Gift Value:** Displays the single smallest gift amount recorded for partners
 - **Sum of Gift Value:** Adds up the gift amounts associated with partners

- **Partners Folder:**
 - **Average Number of Days Active:** When aggregation is turned on, this field averages the number of days that partners captured have been active. When the "**Do Not Aggregate Results**" box is checked, this field displays the number of days that each partner captured in the query results has been active.
 - **First Date Joined:** Displays the minimum **Date Joined** for partners
 - **Last Date Joined:** Displays the maximum **Date Joined** for partners
 - **Member Count:** Counts the number of partner records
 - **Sum of Days Active:** When aggregation is turned on, this field adds up the number of days that all partners captured in the query results have been active. When the "**Do Not Aggregate Results**" box is checked, this field displays the number of days that each partner captured in the query results has been active.

Pledges Folder:

- **First Pledge Date:** Displays the minimum **Pledge Date** for partners
- **Last Pledge Date:** Displays the maximum **Pledge Date** for partners
- **Last Pledge Start Date:** Displays the maximum **Pledge Start Date** for partners
- **Pledge Count:** Counts the number of pledge records for partners

- **Soft Credits Folder:**
 - **First Soft Credit Date:** Displays the minimum **Soft Credit Date** for partners
 - **Last Soft Credit Date:** Displays the maximum **Soft Credit Date** for partners
 - **Soft Credit Count:** Counts the number of soft credits for partners
 - **Sum of Soft Credit Amount:** Adds up the soft credit amounts for partners

Query Type: **FundItems**

- **Activity Folder:**
 - **Sum Total Transaction Amount:** Adds up the **Total Transaction Amount** on invoices associated with funds
- **FundItems Folder:**
 - **Item Count:** Counts the number of distinct invoices associated with funds
 - **Sum of Amount:** (Under construction)
- **InvoiceItems Folder:**
 - **Sum of Item Net:** Adds up the **Item Net** amount on invoices associated with funds
 - **Sum of Item Quantity:** Adds up the **Item Quantity** total on invoices associated with funds

Query Type: **Funds**

- **Gifts Folder:**
 - **Sum of Gift Value:** Adds up the number of gifts received on invoices associated with funds

Query Type: **Gifts**

○ **Gifts Folder:**

- **Average Gift Value:** When the "Do Not Aggregate Results" box is unchecked, this field calculates the average gift amount (the total amount of gifts divided by the total number of gifts) for all gifts captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the gift amount for each gift record
- **First Gift Date:** When the "Do Not Aggregate Results" box is unchecked, this field calculates the minimum **Date Received** for all gifts captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the **Date Received** for each gift record
- **Gift Count:** Counts the number of gifts
- **Last Gift Date:** When the "Do Not Aggregate Results" box is unchecked, this field calculates the maximum **Date Received** for all gifts captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the **Date Received** for each gift record
- **Member Count:** When the "Do Not Aggregate Results" box is unchecked, this field counts the number of distinct partners associated with gifts. When the "Do Not Aggregate Results" box is checked, this field simply displays a "1" for each gift record
- **Sum of Gift Value:** Adds up the number of gifts received on invoices associated with funds

○ **Partners Folder:**

- **Gift Member Count:** When the "Do Not Aggregate Results" box is unchecked, this field counts the number of distinct partners associated with gifts captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays a "1" for each gift record.

Query Type: **Inventory**

- **Inventory Assets Folder:**
 - **Average Item Cost:** When the "Do Not Aggregate Results" box is unchecked, this field averages the **Item Costs** (the sum of **Item Cost** divided by the total number of items) for all inventory items captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the **Item Cost** for each inventory item.
 - **Inventory Value:** (Under construction)
 - **On Order:** Adds up the quantity of inventory items currently on order.

Query Type: **InvoiceGifts**

- **InvoiceGifts Folder:**
 - **Gift Count:** Counts the number of invoice records that contain a gift amount for all invoices
 - **Max Gift Value:** The highest single gift amount recorded on invoices
 - **Sum of Gift Value:** Adds up the **Gift Value** field for all invoices
- **Invoices Folder:**
 - **First Gift Date:** When the "Do Not Aggregate Results" box is unchecked, this field calculates the minimum **Gift Date** for all gift invoices captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the **Gift Date** for each gift invoice record.
 - **Last Gift Date:** When the "Do Not Aggregate Results" box is unchecked, this field calculates the maximum **Gift Date** for all gift invoices captured by the query. When the "Do Not Aggregate Results" box is checked, this field simply displays the **Gift Date** for each gift invoice record.
 - **Partner Count:** Counts the number of distinct partners associated with gift invoices

Query Type: **InvoiceItems**

○ **InvoiceItems** Folder:

- **Item Quantity:** For invoices captured by the query, this field counts the number of the associated items ordered
- **Sum of Item Net:** Adds up the **Total Item Net** ((item price * item quantity)-discount) for all invoices
- **Sum of Item Quantity:** For invoices captured by the query, this field counts the number of the associated items ordered
- **Sum of Item Value:** Adds up the value of all items ordered (item price * item quantity), before discount, for all invoices

Invoices Folder:

- **Order Count:** Counts the number of invoice records

Query Type: **Invoices**

○ **InvoiceGifts** Folder:

- **Sum of Gift Value:** Adds up the donation (**Gift Value**) amounts on all invoices

Invoices Folder:

- **Sum of Balance Due:** Adds up the **Balance Due** amounts on all invoices
- **Sum of Invoice Total:** Adds up the total amount of income received (**Invoice Total**) for all invoices
- **Sum of Item FMV:** Adds up the fair market value amounts (**Item FMV**) associated with all items on invoices
- **Sum of Item Net:** Adds up the amount of revenue received toward product purchases, not including shipping, for all invoices

Query Type: **Letters**

○ **Letters** Folder:

- **Number Mailed:** Counts the number of partner records included in finalized **Appeal Pulls** for all mailings

Query Type: **Packages**

○ **Packages** Folder:

- **Mail Count:** Counts the number of partner records associated with **Packages** included in finalized **Appeal Pulls** for all **Packages**

Query Type: **Payments**

○ **Payments** Folder:

- **Sum of Payments:** Adds up the number of payments received for all payment records

Query Type: **Pledges**

- **InvocieGifts Folder:**
 - **Gift Count:** Counts the number of gifts received toward the fulfillment of pledges
 - **Sum of Gift Value:** Adds up the gift amounts received toward the fulfillment of pledges
 - **Total Payments:** Adds up the payment amounts received toward the fulfillment of pledges
- **Invoices Folder:**
 - **Last Gift Date:** The maximum, or most recent, **Gift Date** on gifts received toward the fulfillment of pledges
- **Partners Folder:**
 - **Pledge Member Count:** Counts the number of partner records associated with pledges
- **Pledges Folder:**
 - **Sum of Pledge Value:** Adds up the total cash value (all amounts pledged) for all pledges

Query Type: **Products**

- **Partners Folder:**
 - **Partner Count:** Counts the number of partners who have ordered the inventory item or items
- **Products Folder:**
 - **Sum Number Of Enclosures:** For the item or items captured by the query, this field adds up the quantity of these items that were fulfilled as enclosures. Enclosures are inventory items that are sent to partners as part of the acknowledgment fulfillment process.
 - **Sum Number of Ordered Product:** For the item or items captured by the query, this field adds up the quantity of these items that were ordered by partners.
 - **Sum of Cost:** Under construction
 - **Sum of Quantity:** For the item or items captured by the query, this field adds up the quantity of these items that were either ordered by partners or sent to partners as enclosures.
 - **Sum of Revenue:** For the item or items captured by the query, this field adds up the income received. It is calculated by multiplying the quantity ordered by the item price and then subtracting the discount

amount (**(Number of Ordered Products * Price) - Discount**).

- **Sum of Shipped:** For the item or items captured by the query, this field adds up the quantity of these items that have the "Shipped" status.
- **Sum of Total Cost:** For the item or items captured by the query, this field calculates the total cost by multiplying the **Item Cost** by the sum of the quantity ordered and the quantity sent as enclosures (**Item Cost * (Number of Ordered Product + Number of Enclosures)**).
- **Sum of Unshipped:** For the item or items captured by the query, this field adds up the quantity of these items that do not have the "Shipped" status
- **Sum Pull Item Count:** Under construction
- **Sum Pull Shipment Count:** Under construction

Query Type: **UserActivity**

- **Activity Folder:**
 - **Batch Size:** Adds up the number of activities within batches
 - **Batch Value:** Adds up the activity values recorded within batches

APPENDIX C: Frequently Created Queries

How to use this Appendix: The following **25 queries** are frequently used queries used by clients in the Aegis CRM. They are laid out so that they can be recreated in any user's database. Users may have renamed fields or configurations that will differ slightly from these stock Aegis representations. This is especially likely in the case of what the stock system labels as DONORS; clients should substitute their convention: PARTNERS, CONSTITUENTS, ACCOUNTS, etc.

The **Name** and the **Objectives (yellow)** for each query will be as generic as possible. Users should understand the purpose of the query in reading those areas. They should also rename the query for the specific purpose they are targeting.

The **General, Criteria,** and **Output** use specific, Aegis Stock CRM data; users should adjust these to both the specific Criteria they wish to target – for instance, in the query below they may want a different year from 2024 or a different State from NY – and to what they wish to view as the Output.

The **Aqua** highlighted areas represent field or command values. Again, users should use these as templates for first time creation but should explore beyond by adding the fields/values they need.

QUERY TYPE COMPARISON - Queries 026 A (Contacts), B (Gifts), C (Activities), D (Fund Items)

00A-CONTACTS

Objectives:

- Results using **CONTACTS** Query Type
- Used for Donor Names/Addresses per time period, Appeal, Segment, etc.
- Used exclusively for APPEAL PULLS as returns ONE donor name for mailing
- Displays giving TOTALS per Donor: Yearly, Lifetime, Counts, Revenue, etc.
- NO INDIVIDUAL TRANSACTION level data – Use Gifts/Funds (Activity) Query Types
- CANNOT see Fund Item data in this Query Type
- AVOID using the Activity folder for Criteria/Output – use Gift folder

00B-GIFTS

Objectives:

- Results using **GIFTS** Query Type
- SELECTED Transactions:
 - Positive & Negative values: Donations, Orders, Split Transactions, & Refunds
 - Will NOT display ANY Zero \$ value Transactions
- Effective for Revenue Reporting – track bottom line \$'s
- CANNOT see Fund Item data in this Query Type

00C-ACTIVITY

Objectives:

- Results using **ACTIVITIES** Query Type
- ALL Transactions:
 - Positive & Negative Transactions: Donations, Orders, Split, & Refunds
 - Zero \$ Value Transactions: Pledges, Donor Edit/Add, & Generic Responses
- Can filter out Transaction Types, BUT should use Gifts for All Revenue
- CANNOT see Fund Item data in this Query Type

00D-FUND ITEMS

Objectives:

- Results using **FUND ITEMS** Query Type
- Used predominantly for Financial/Accounting based reporting/audits
- Displays ALL Fund Code values assigned to Split Transactions
 - Other Query Types CANNOT show Fund Code level for Split Transactions or special Contributions - Fund Items Query Type CAN
 - E.G. - A \$75 payment is recorded as:
 - \$50 for Contribution to the 1st Fund
 - \$25 for a Product Purchase to a 2nd Fund

01-Yearly Donor Counts/Rev by City State

Objectives:

- Individual GIFT Counts PER City FOR DESIGNATED State
- Last 12 Months
- Total Gift \$ Given
- Total Count of Gifts

General:

- Name: 01
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Donors: State
 - Is equal to NY
- Gifts: Year Received
 - Is Equal to 2024
- Gifts: Gift Value
 - Is Greater than or Equal to 100

Output:

- Donors: City
- Gifts: Total Gifts Last 12 Months
- Gifts: Sum of Gifts Last 12 Months

Sort:

- City (Ascending)

SAVE

Results Count

Sample Results

02-Donor Activity Count & Revenue by Date & Value Minimum

Objectives:

- Donors who made donations of greater than \$25 during given Date Range
- Gifts are most accurate Query Type for Revenue

General:

- Name: **02**
- Query Type: **Gifts**
 - NOTE: Can't use fields w/in Activity & Gifts in same query – One OR Other
- Description: **LEAVE BLANK**

Criteria:

- Gifts: **Date Received**
 - Greater than or Equal to: **1/1/2024**
- Gifts: **Date Received**
 - Less than or Equal to: **12/31/2024**
- Gifts: **Gift Value**
 - Greater or Equal to **25** (No \$ signs/commas)

Output:

- Donors: **Donor ID**
- Donors: **Full Name**
- Activity: **Date Received**
- Activity: **Gift Value**

Sort: **Gift Value (Descending)**

SAVE

Sample Results

03-Miles by Point

Objectives:

- Number of Donors within Miles radius
- No need to enter string of ZIP codes
- Lifetime Giving, Date & Amount of Last Gift

General:

- Name: 03
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Donors: Miles from Point
 - Is Less than or Equal to: 20 Miles
 - Address: 105 Sir Lawrence Dr
 - City: Belleville
 - State: IL (Can just enter Zip, hit GEOCODE, and state will auto-fill)
 - Zip: 62221
 - Click GEOCODE button (Lats & Longs display)

Output:

- Donors: Donors ID – This displays useful hyperlink to Donor record
- Donors: Full Name
- Donors: Address
- Donors: City
- Donors: State
- Donors: Zip Code
- Gifts: Lifetime Sum of Gift Value
- Gifts: Last Gift Date
- Nightly Calculated Fields: Last Gift Amount

SAVE

Sample Results

NOTE: Amount Results are high. IF NOT doing a check on dollar amounts (which not doing in this case) Users will want to add following Criteria:

- Donors: Prospect
 - Equals FALSE
- This eliminates all non-donating records in DB
- OR Donors: LifetimeTotalRevenue
 - Is Not Equal to 0

04-Using OR Statements in Queries

Objectives:

- Over Given Date Range
- 3 or More Gifts w/in Range
- \$100 or More over last 12 Months
- Lives in OH OR TX (intro “OR” Statements)

General

- Name: 04
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Gifts: Sum of Gifts Last 12 Months
 - Is Greater than or Equal to 100
- Gifts: Total Gifts Last 12 Months
 - Is Greater than or Equal to 3
- Donors: State
 - equals OH
- Donors: State
 - equals TX
 - CLICK OR button– creates OR statement at bottom of Criteria section

Output:

- Donors: Donors ID
- Donors: Full Name
- Donors: State
- Nightly Calculated Fields: LastGiftDate – ALL one word
- Gifts: Total Gifts Last 12 Months
- Gifts: Sum of Gifts Last 12 Months

Sort: Sum of Gifts Last 12 Months (Descending)

SAVE

Sample Results

05A & 05B -Yearly Revenue Totals & Monthly Revenue Totals

Objectives:

- Displays Revenue for Yearly and Monthly Gifts
- Leveraged in Dashboards
-

5A

General

- Name: 05A
- Query Type: Gifts
- Description: LEAVE BLANK

Criteria:

- Gifts: Date Received
 - Is Greater than or Equal to 01/01/2020
- Gifts: Date Received
 - Is Less than or Equal to 01/01/2099

Output:

- Gifts: Year Received
- Gifts: Gift Count
- Gifts: Sum of Gift Value

Sort: Year Received

SAVE

Sample Results

5B

General

- Name: 05B
- Query Type: Gifts
- Description: LEAVE BLANK

Criteria:

- Gifts: Date Received
 - Is Greater than or Equal to 01/01/2023

Output:

- Gifts: Year Received
- Gifts: Month Received
- Gifts: Gift Count
- Gifts: Sum of Gift Value

Sort: Year Received

Month Received

SAVE

Sample Results

06-Query with a Query

Objectives:

- Brings in All persons from TRN 003 (Miles by Point) Solicited for ANY Appeal
- Could Add Criteria Date Range to narrow scope to a particular year

General:

- Name: 06
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Donors: With Donors
 - Contained In 003-TRN: Miles by Point
 - Could exclude by using, Not Contained In operator
 - “With” Field enables the bringing in of existing Query
 - “With” exists in all Tables, i.e. “With Contacts”, “With Bequests”, etc.
- Letters: With Letters
 - Contained in 011-TRN: Sol Counts by Appeal

Output:

- Donors: Donors ID
- Donors: Full Name
- Letters: First Solicitation Appeal
- Letters: Last Solicitation Appeal

SAVE

Results Count AND Sample Results

Look at difference in Results Count for Query 02 vs. Query 05 – there are LESS in Query 05 just counting unique Donors (plus the letter criteria – but in training DB, it was mailed to ALL).

07A & 07B-Leveraging a Query as an exclusion in another Query

Objectives:

- Pull Donors NOT mailed the 2X_1WT Appeal **BUT** still made donation
 - How many Spring Appeal gifts they donated
 - How much Spring Appeal revenue they contributed
- Build TWO Queries:
 - First Query finds Contained in Appeal
 - Second Query uses first Query to filter it for NOT Contained In Appeal

7A

General:

- Name: 7A
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Functions: With Letter
 - Contained In 24_1WT

Output:

- Donors: Donors ID

SAVE

Results Count: 2680

7B

General:

- Name: 7B
- Query Type: Activity
- Description: 24_1WT Appeal NOT mailed Solicitation BUT still donated to 24_1WT

Criteria:

- Donors: With Donors
 - Not Contained In 7A
- Appeals: Appeal ID
 - Is Equal to 24_1WT

Output

- Donors: Donors ID
- Activity: Gift Count
- Activity: Sum of Activity Value
- Segmentation: Segment ID
- Segmentation: Segment Description

SAVE

Sample Results

- 75 Donors display

08-Major Gift Officer Report

Objectives:

- List of Top Donors assigned to Major Gift Officer
- Displays data on Giving, Activity, Address Info, Name, etc.
- Can filter by specific officer to display on the Gift Officer's Home Dashboard

General:

- Name: **08**
- Query Type: **Contacts**
- Mark as a Favorite Query: **Check Box** (Enables addition to Dashboard)
- Description: **LEAVE BLANK**

Criteria:

- Regional Development Director: **RDD User Name**
 - Is Not Empty

Output:

- Regional Development Director: **RDD Full Name**
- Donors: **Donors ID**
- Donors: **Full Name**
- Donors: **City**
- Donors: **State**
- Donors: **Home Phone**
- Donors: **Lifetime Revenue**
- Gifts: **Gift Count**
- Gifts: **Single Largest Gift**
- Gifts: **Last Gift Date**
- Nightly Calc Fields: **Last Gift Amount**

SAVE

Sample Results

09-Credit Card Expiring

Objectives:

- Track Active Pledges where credit card is expiring in the following month.

General:

- Name: 09
- Query Type: Pledges
- Description: LEAVE BLANK

Criteria:

- Pledges: Active Pledge
 - Is Equal to: TRUE
- Pledges: Automatic Payment
 - Is Equal to: TRUE
- Pledges: Expiration Date
 - Is Greater than or Equal to: 01/01/2019
- Pledges: Expiration Date
 - Is Less than or Equal to: 12/31/2019

Output:

- Donors: Full Name
- Donors: Address
- Pledges: Pledge Value
- Pledges: Automatic Payment
- Pledges: Expiration Date
- Pledges: Day to Charge
- Donors: City
- Donors: State
- Donors: Zip
- Donors: Phone1
- Donors: Email

SAVE

Sample Results

- Count: 285

NOTES: This is a pledge level query, not donor level so if the person has 2 active pledges and they both have expired CCs, they will show up 2x

10-Acknowledgement Letters per Pledge

Objectives:

- Find donors who made pledge gift of \$19+ to specific appeal AND ensure acknowledgement letter includes a gift

General:

- Name: 10
- Query Type: Invoice Gifts
- Description: LEAVE BLANK

Criteria:

- Invoice Gifts: Gift Amount
 - Is Greater than or Equal to: 19
- Appeals: Appeal ID
 - Is Equal to: 24_1WT
 -
- Pledges: Is Pledge Gift
 - Is Equal to: TRUE

Output:

- Donors: Full Name
- Donors: Address
- Invoices: Gift Date
- InvoiceGifts: Gift Amount
- Donors: City
- Donors: State
- Donors: Zip

SAVE

Sample Results

- Count: 37

NOTES: Query is pulling on transaction level, not donor level, so if a person gave MULTIPLE gifts of \$19 or more - they will be in the export MULTIPLE TIMES.

011-Solicitation Counts by Appeal

Objectives:

- Use the Letter table to create query on Mail-to-file data.
- Query provides quick count of letters mailed by appeal within a mail date range.

General:

- Name: 11
- Query Type: Letters
- Description: LEAVE BLANK

Criteria:

- AppealPulls: Mail Date
- Is Greater than or Equal to 01/01/2020
- AppealPulls: Mail Date
 - Is Less than or Equal to 12/31/2024
 - **AppealPulls Mail Date** does NOT equal **Letters Date Pulled**.
 - **Letters Date Pulled** is the date data extracted from DB (4-6 weeks BEFORE Mailed), NOT the date mailed.
 - **Appeal Pulls Mail Date** IS the actual date mailed.

Output:

- Appeals: Appeal ID
- Appeals: Appeal Name
- AppealPulls: Mail Date
- Letters: Date Pulled
- Letters: Number Mailed
- **Sort Fields:**
 - **Appeal ID (Descending)** – Descending just because data a little wonky; don't have Appeal Names/IDs for all mailings...

SAVE

Sample Results

- Count: 373

12- Solicitation Appeal Segment Counts

Objectives:

- Displays summary of results for each Appeal-Segment-Id –
- Total Contacted & Revenue PER SEGMENT
 - Getting Total Contacted & Revenue PER APPEAL would be a different report
- May be called the Source Code Name

General:

- Name: 12
- Query Type: Activity
- Description: LEAVE BLANK

Criteria:

- Appeals: Appeal ID
 - Is Equal to: 24_1WT
- Activity: Activity Value
 - Is Greater than or Equal to: .01
 - Ensures there are NO 0 \$ transactions included
 - Be careful NOT to use Activity: Gift Count – complicates things

Output:

- Appeals: Appeal ID
- Appeals: Appeal Segment
- Appeals: Appeal Segment Description
- Gifts: Gift Count
- Gifts: Sum of Gift Value
- Sort Fields:
 - Appeal Segment (Ascending)

SAVE

Sample Results

13-Transactions per Fund

Objectives:

- Demoes how to pull data from FundItems table (Order Details)
- Displays detail level transaction data split between contribution orders and/or multiple fund codes
 - Transaction displays total amount of “gift” on order
 - Details display multiple fund codes IF gift amount is split (Unusual)

General:

- Name: 13
- Query Type: FundItems
- Description: LEAVE BLANK.

Criteria:

- Leave BLANK

Output:

- Funds: Fund ID
- Funds: Fund Name
- FundItems: Sum of Amount
- **Sort Fields:**
 - Fund ID (Ascending)

SAVE

Sample Results

- Count: 6

NOTE:

- To add a date to this report – Use Invoices: Item Date, NOT Batch Date. Invoices will have historical data; Batch Date will only have since you implemented Aegis

14-Acknowledgement Letters Sent

Objectives:

- Obtain outbound activity information – Acknowledgement letters sent

General:

- Name: 14
- Query Type: OutboundActivity
- Description: LEAVE BLANK

Criteria:

- Leave BLANK

Output:

- Appeals: Appeal ID
- Appeals: Response ID
- Appeals: Response Name
- OutboundActivity: Number of Printed Letters

Sort:

- Appeal ID (Ascending)

SAVE

Sample Results

- Count: 33

15-Inventory Remaining

Objectives:

- Tracks remaining Inventory on hand

General:

- Name: 15
- Query Type: Inventory
- Description: LEAVE BLANK

Criteria:

- Inventory: Active
 - Is equal to: True
- InventoryAssets: In Stock
 - Is Greater than or Equal to: 0

Output:

- Inventory: Item SKU
- Inventory: Item Description
- Inventory: Warehouse
- InventoryAssets: In Stock
- Inventory: Price

Sort:

- ITEM SKU (Ascending)

SAVE

Sample Results

16-Past Due Follow Ups

Objectives:

- Track Follow Ups to Notes that are Past Due by Assignee

General:

- Name: 16
- Query Type: ContactNotes
- Description: LEAVE BLANK

Criteria:

- DonorsNotes: Follow Up Date
 - Is Less than 06/12/2023
- DonorsNotes: Follow Up Result Code
 - Is Not Equal to Completed

Output:

- Donors: MGO Full Name (Displays as RDD Full Name)
- Donors Notes: Follow Up Date
- Donors Notes: Full Name
- Donors Notes: Follow Up Result Code
- Donors Notes: Note Type
- Donors Notes: Subject
- Donors Notes: Entered By
- Donors Notes: Follow Up Assigned To

Sort:

- RDD Full Name (Ascending) =s MGO Full Name
- Follow Up Result Code
- Follow Up Date

SAVE

Sample Results

- Count: 285

NOTES: Frequently leveraged in Charts

17A & 17B-Creating & Leveraging a Gift Query Type within a Contact Query

Objectives:

- Display largest gift 2024 on >= \$500

General:

- Name: 17A
- Query Type: Gifts
- Description: LEAVE BLANK

Criteria:

- Gifts: Date Received
 - Is Greater than or Equal to 01/01/2024
- Gifts: Gift Value
 - Is Greater than or Equal to 500

Output:

- Donors: Donors ID
- Donors: Full Name
- Gifts: Gift Value

SAVE

Sample Results

Objectives:

- Displays largest gift 2021 on >= \$500 from TRN 017
- Displays Major Donor Officer which is NOT available under a Query Type of Gifts BUT is under Contacts Query Type

General:

- Name: 17B
- Query Type: Contacts
- Description: LEAVE BLANK

Criteria:

- Activity: With Gifts
 - Contained in: 17A

Output:

- Donors: Donors ID
- Donors: Full Name
- Donors: City
- Donors: State
- Gifts: Last Gift Date
- Nightly Calculated Fields: LastGiftValue
- Major Donor Status: Major Donor Status
- Major Gift Officer: MGO Full Name

SAVE

Sample Results

Returns a single donor record so that accurate list of actual number of donors who gave over \$500 returned; they may have given \$500 MORE than once during that period, but it only counts their name ONE TIME; good for mailing list purposes.

18A, 18B, 18C-ACKS Comparison/Exclusion

Objectives:

- Mailed Appeal 24_1WT

General:

- Name: 18A
- Query Type: Outbound Activity
- Description: LEAVE BLANK

Criteria:

- Appeals: Appeal ID
 - Is Equal to: 24_1WT

Output:

- Donors: Donors ID

SAVE

Objectives:

- Mailed Appeal 24_2ES

General:

- Name: 18B
- Query Type: Outbound Activity

- Description: LEAVE BLANK

- Appeals: Appeal ID
 - Is Equal to: 24_2ES

Output:

- Donors: Donors ID

SAVE

Objectives:

- Mailed Appeal 24_1WT but not 24_2ES

General:

- Name: 18C
- Query Type: Activity
- Description: LEAVE BLANK

Criteria:

- Outbound Activity: With Response Letters
 - Contained In: TRN 019
- Outbound Activity: With Response Letters
 - Not Contained In: TRN 020

Output:

- Donors: Donors ID
- Donors: Full Name
- Gifts: Last GiftDate
- Segmentation: Current Segment
- Segmentation: Current Segment Description

SAVE

Sample Results: Count – 133

19- Soft Credits

Objectives:

Pulls Donations with designated Soft Credits.

General:

- Name: 19
- Query Type: GiftReferences
- Description: LEAVE BLANK

Criteria:

- Activity: Matching Activity Date
 - Is Greater than or Equal to: 01/01/2024
- Activity: Matching Activity Date
 - Is Less than or Equal to: 12/31/2024
- GiftReferences: Motivating Reason
 - Is Not Equal to: Workplace Giving

Output:

- Motivating Donors: Motivating Gift Donors ID
- Motivating Donors: Motivating Gift Full Name
- GiftReferences: Motivating Reason
- Activity: Matching Activity Date
- Matching Donors: Matching Gift Donor ID
- Matching Donors: Matching Gift Full Name
- Activity Reference: Matching Dollar Amount
- Appeals: Matching AppealID

SAVE

Sample Results

NOTES: REMINDER:

- MATCHING FIELDS in QUERY = The HARD CREDIT (person who wrote the check).
- MOTIVATING FIELDS in QUERY = The SOFT CREDIT (person who motivated the person to write the check).

20A- Initial Donation & PENDING Company Matches

Objectives:

Pull Pending Donor & Company Match Data

Helps users to see which Companies have NOT Matched Donations as promised

General:

- Name: 20A
- Query Type: GiftReferences
- Description: LEAVE BLANK

Criteria:

- Activity: Motivating Activity Date
 - Is Greater than or Equal to: 01/01/2024
- Activity: Motivating Activity Date
 - Is Less than or Equal to: 12/31/2024
- Activity: Matching Activity Date
 - Is Less Empty

Output:

- Activity: Matching Activity Date
- Matching Donors: Matching Gift Donor ID
- Matching Donors: Matching Gift Full Name
- Activity Reference: Matching Dollar Amount
- Appeals: Matching AppealID
- Activity: Motivating Activity Date
- Motivating Donors: Motivating Gift Donor ID
- Motivating Donors: Motivating Gift Full Name
- Activity Reference: Motivating Dollar Amount
- Appeals: Motivating AppealID
- GiftReferences: Motivating Reason

SAVE

Sample Results

Sort

- Matching Activity Date (Descending)

20B-Initial Donation & COMPLETED Company Matches

Objectives:

- Pulls Complete Initial Donor & Company Match Data
- Helps users to see which Companies HAVE Matched Donations as promised

General:

- Name: **20B**
- Query Type: **GiftReferences**
- Description: **LEAVE BLANK**

Criteria:

- Activity: **Matching Activity Date**
 - Is Greater than or Equal to: **01/01/2024**
- Activity: **Matching Activity Date**
 - Is Less than or Equal to: **12/31/2024**
- GiftReferences: **Motivating Reason**
 - Is Equal to: **Workplace Giving**
- Activity Reference: **Motivating Dollar Amount**
 - Is Greater than: **0**

Output:

- Activity: **Matching Activity Date**
- Matching Donors: **Matching Gift Donor ID**
- Matching Donors: **Matching Gift Full Name**
- Activity Reference: **Matching Dollar Amount**
- Appeals: **Matching AppealID**
- Activity: **Motivating Activity Date**
- Motivating Donors: **Motivating Gift Donor ID**
- Motivating Donors: **Motivating Gift Full Name**
- Activity Reference: **Motivating Dollar Amount**
- Appeals: **Motivating AppealID**
- GiftReferences: **Motivating Reason**

SAVE

Sample Results

Sort

- Motivating Activity Date (Descending)

21-Volunteer Schedule

Objectives:

- Find Volunteers and display available schedule

General:

- Name: 20
- Query Type: Volunteers
- Description: LEAVE BLANK

Criteria:

- Roles: Active Role
 - Is One of: TRUE

Output:

- Volunteers: Partner ID
- Volunteers: Full Name
- Volunteers: ActiveAddress
- Volunteers: Active City
- Volunteers: Phone1
- Volunteers: Primary Email
- Roles: Role Description
- Availability: Any Time
- Availability: HoursPerWeek
- Availability: Monday Times
- Availability: Tuesday Times
- Availability: Wednesday Times
- Availability: Thursday Times
- Availability: Friday Times
- Availability: Saturday Times
- Availability: Sunday Times

SAVE

Sample Results