

**BLACKBAUD
ONLINE USER CLINICS**

Log on, Listen, and Learn

Q&A and Technical Assistance

To submit a text question:

- 1) Click Q&A pane
- 2) Type question in the 'type a question for the presenter' field
- 3) Click the Ask button

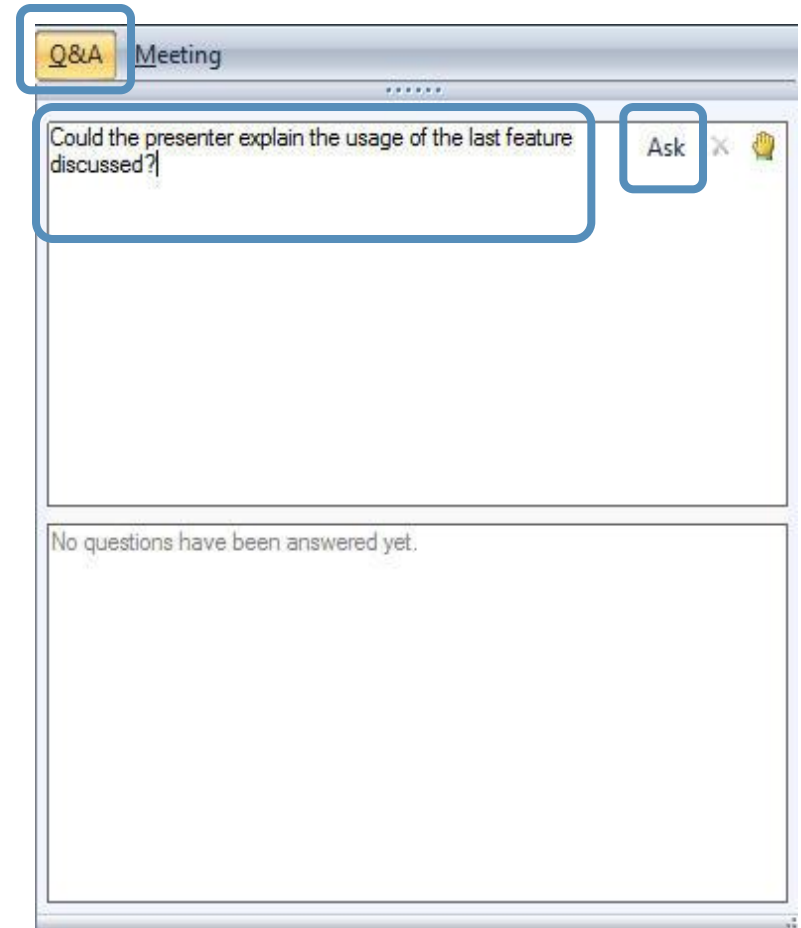
Note: Use the scroll button to scroll to your answer if necessary.

For technical assistance connecting:

Intercall: 800.374.1852

Live Meeting: 866.493.2825

Note: These numbers are for technical assistance, they are not the call-in numbers to listen to the event.



The Raiser's Edge Online User Clinics: Query

Monday - April 19, 2010

Host: William Jankins, Solutions Engineer

Agenda

- Welcome and Introductions
- Blackbaud News and Updates
- Support Resources
- Query Presentation
- How Blackbaud Can Help
- Q&A



Blackbaud Learn™: An Overview

Get the most out of your solutions with Blackbaud Learn:

An annual training subscription that provides ongoing skill development and job knowledge training via tiered packages to best fit your needs and keep every staff member engaged in active, lifelong learning.

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- ✓ **Live lessons on best practices and nonprofit strategies**
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- ✓ **Exclusive “Q&A” office-hours with experts each month**
- ✓ **Self-paced and on-demand classes available online 24/7**
- ✓ **Constantly evolving curriculum**
- ✓ **No travel costs or hassle for more than 95% of classes**
- ✓ **Monthly training newsletter with new class alerts, tips and tricks**

View the course catalog online at www.blackbaud.com/training.

Blackbaud Learn™ for Internet

Get expert training on your Internet solutions and all of your Internet-related activities. Learn the software skills you need, plus best practices for eMarketing, building online communities, website management, and more!

View the course catalog online at www.blackbaud.com/InternetLearn.

DO YOU WANT TO...	TRY OUR CLASS...
Prepare staff for upcoming online fundraising events?	Managing Events Online
Ensure your website content is fresh and exciting?	Introduction to Blackbaud NetCommunity™ or Introduction to Blackbaud® Sphere™
Test email messages?	Communicating with Constituents Online
Drive donor action online?	Targeting Website Content
Grow your email address list?	Making the Most of Email Marketing
Engage and communicate with constituents using Web 2.0 tools?	Social Media Demystified: 50 Social Media Tactics for Nonprofits

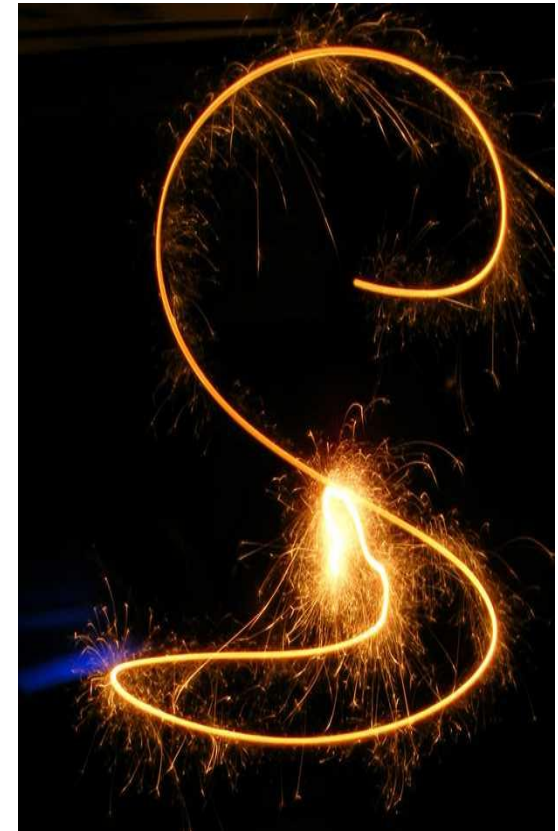
Blackbaud Application Hosting™

Application Hosting offers you a convenient, affordable alternative to setting up and managing Blackbaud applications on your own.

- **Security** – World-class security measures that employ 24/7/365 system monitoring
- **Uptime Guarantees** – 99.9% or better uptime – applications are always available and designed to perform at the optimal level
- **Disaster Recovery** – Immediate access to key business applications, even when unforeseen events pose an obstacle or threat
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- **Remote Access** – Access to your Blackbaud software anytime, anywhere via a web browser
- **Availability** – Host The Raiser's Edge, The Financial Edge, Blackbaud NetCommunity, The Researcher's Edge, The Patron Edge Online, Blackbaud Enterprise CRM, Blackbaud Direct Marketing, The Education Edge, and more!

Blackbaud NetCommunity Spark™

- Blackbaud NetCommunity Spark is a new online marketing and membership solution that ignites your website!
- Spark seamlessly integrates with The Raiser's Edge
- Bring your website to life with:
 - Unmatched online membership and fundraising tools
 - Email marketing to help drive new & renewing support
 - Online event management and registrations
- Join us for a free web seminar: Ignite Your Website with Blackbaud NetCommunity Spark
 - 4/27/10 at 1:00 p.m. ET
 - 5/11/10 at 2:00 p.m. ET
 - 5/26/10 at 2:00 p.m. ET



Blackbaud's 2010 Conference for Nonprofits

- Join us to experience everything you have come to love about the Blackbaud Conference — three days of educational content dedicated to your specific needs and opportunities to network and interact with your peers and industry experts — all in a new venue that will have more to offer than ever before!
- October 20 – 22, 2010 at the Gaylord National Hotel and Convention Center in Washington, D.C.
- [Click here to learn more about the 2010 Conference!](#)



Upcoming Web Seminars

- Activate Online Marketing & Engagement: An Overview of BBNC Grow
 - 4/21/10 at 2:00 p.m. ET

- Engaging Your Supporters Online with Sphere Grow
 - 5/20/10 at 2:00 p.m. ET

- The Financial Edge for Raiser's Edge Customers
 - 5/5/10 at 2:00 p.m. ET
 - 5/13/10 at 2:00 p.m. ET

- Getting to Know AuctionMaestro Pro
 - 4/28/10 at 2:00 p.m. ET
 - 5/26/10 at 2:00 p.m. ET

- For a schedule of all upcoming web seminars or to register, go to www.blackbaud.com/webinars.

New Custom Solutions: Duplicate Constituent Merge Utility For Bulk De-Duplication in The Raiser's Edge

The screenshot displays the 'Duplicate Constituent Merge Utility' window within 'The Raiser's Edge - Sample Data' application. The window title is 'Plug-Ins • Duplicate Constituent Merge Utility - Sample Data'. The interface includes a 'Select Constituent Query' field, a 'Master Record Criteria' dropdown set to 'Oldest Constituent', and buttons for 'Report', 'Merge', and 'Find'. A checkbox for 'Include associated non-query duplicates' is present. Below this is a section titled 'Manually manage duplicate records:' containing a table with columns for Master Record, Merge Record, Last Name, First Name, Address, City, State, ZIP, Last Gift, ID, Import ID, and BBNC. The table lists three records for 'Cousino, Megan' in Charleston, SC. At the bottom, there are options for 'Merge Records in Unattended Mode', 'Delete merged records', 'Generate control report', and 'Remove duplicate attributes and constituent codes' (which is checked). An 'About' button is also visible.

Master Record	Merge Record	Last Name	First Name	Address	City	State	ZIP	Last Gift	ID	Import ID	BBNC
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cousino	Megan	2000 Daniel Is...	Charleston	SC	29412	No Gifts	359	00001-593-000...	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cousino	Megan	2001 Daniel Is...	Charleston	SC	29412	No Gifts	360	00001-593-000...	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cousino	Megan	2002 Daniel Is...	Charleston	SC	29412	No Gifts	361	00001-593-000...	<input type="checkbox"/>

New Custom Solutions: Call Center For Phone Solicitations (Phone-a-Thon Fundraising)

Call Center

Instructions

To begin your shift

To start your shift, select your assigned appeal, package, and call list from the dropdown menus under Start Call Center Shift. You may also select a time zone to filter the call list. When the appropriate selections have been made, click Begin Shift. After each call you can choose to save and go to the next constituent or save and log out. When the constituent list is exhausted you can choose another list or log out of the shift. You can log out at any time in the process.

To view a report

Choose the date range for which information should be displayed and then click Open Report.

Reports

Specify a date range and click Open Report to view the report.

Start Date: End Date:

[Set Path To Solicitation Scripts File](#)
[Import Time Zones](#)

Start Call Center Shift

Choose an Appeal, and a Package, then choose a Call List. You may also select a time zone to filter the call list. After you have made the appropriate selections click Begin Shift to begin your shift.

Appeal:

Package:

Call List:

Time Zone:

Call Center

Appeal: Phonation 2009 - Call C Package: Phonation 2009 PackA Call List: All constituents within 20 Time Zone Filter: No Filter

Chief Mr. Harold P. Smalls

Maiden Name: _____
 Nickname: Harry
 Constituent ID: 199
 Constituent Code: Volunteer

Employer: **East Cooper Fire Department**
 Position: Fire Chief

Preferred Address

78 Sycamore Avenue
 Charleston, SC 29407

Type	Value
Cell Phone	843-555-2523

Spouse: _____
 Constituent ID: _____

Education

School	College	Degree	Major	Class Year	Deliv
UNIVERSITY OF SOUTH C.	Four Yes...	BS	Criminal ...	1981	Downr...

Gift History

Date	Amount	Type	Fund ID	Fund Description
11/01/2008	\$1,000.00	Cash	2008ANNUAL	2008 Annual Fund

Action History Contacted This Appeal: 0 Contacted This Year: 0

Result Code	Appeal ID	Date	Solicitor	Notes

Matching Gift Information

Organization	Match Ratio	Min/Max Gift Amount

Donation Information

Pledge One Time Gift

Pledge Amount:

Gift Amount:

Credit Card Type:

Credit Card #:

Expiration Date:

Designation

Call Result

Do Not Call Back Until

Action Note

Phonation Note

New Custom Solutions: Custom Import For Specialized and Frequent Importing

The screenshot displays the 'The Raiser's Edge - Sample Data' application window. The main menu on the left includes options like Query, Export, Reports, Mail, Batch, Mapping, Admin, Config, Scanning, NetSolutions, Dashboard, AuctionMaestro Pro Integration, CounterPoint SQL Integration, Data Health Center, Web Services, Plug-Ins, and Help. The 'Plug-Ins' section is expanded to show 'Custom Import' selected. The main content area is titled 'Custom Import' and contains the following fields:

- Select the file to import:** C:\Program Files\Blackbaud\The Raisers Edge 7\Plugins\Custom Import\Import\CI Demo ImportTEST (5).csv
- Select the import file type:** CI_Demo_CSV
- Specify the constituent query description:** Imported Records
- Specify the gift batch description:** Gifts from lock-box - 9-1-2009

Below these fields are buttons for 'Import' and 'Admin...'. The bottom status bar indicates 'Welcome to The Raiser's Edge 7' and 'The Custom Import plug-in performs custom client imports.'

New Custom Solutions: Volunteer Time System For Volunteer Management and Tracking



The screenshot shows a user interface for a volunteer time system. At the top, there is a dark blue header with a lightbulb icon on the left, the text "Main Menu" and "Main Menu" below it, and a user status on the right that says "Logged In: miller" with a "Logout" link. Below the header, the user is greeted with "Welcome Mary Miller" and a thank-you message. A birthday notification section features a cake icon and the text "Happy Birthday wishes to these volunteers!" followed by names and dates: "Gretchen Jones (05/25)" and "Mary Miller (05/29)". A messages section, indicated by a megaphone icon, states "You have 3 messages" and lists three items: a lightbulb icon for a volunteer appreciation dinner on May 15th, a calendar icon for a birthday wish, and a person icon for a call request. At the bottom, four circular icons with text labels provide navigation: a book icon for "Sign into a job assignment", a clock icon for "Make a timesheet entry", a folder icon for "View upcoming opportunities", and an envelope icon for "Update contact information".

Main Menu
Main Menu

Logged In: miller [Logout](#)

Welcome Mary Miller

Thank you for all that you do to help us succeed. We appreciate your support.

Happy Birthday wishes to these volunteers!

Gretchen Jones (05/25) Mary Miller (05/29)

You have 3 messages

- May is our volunteer month. Join us on May 15th at Wilson Hall for a volunteer appreciation dinner. 6-9 pm. RSVP (407) 321-4233
- We wish you a very Happy Birthday!
- Hi Mary, please give the volunteer office a call at your convenience - (407) 123-1234.

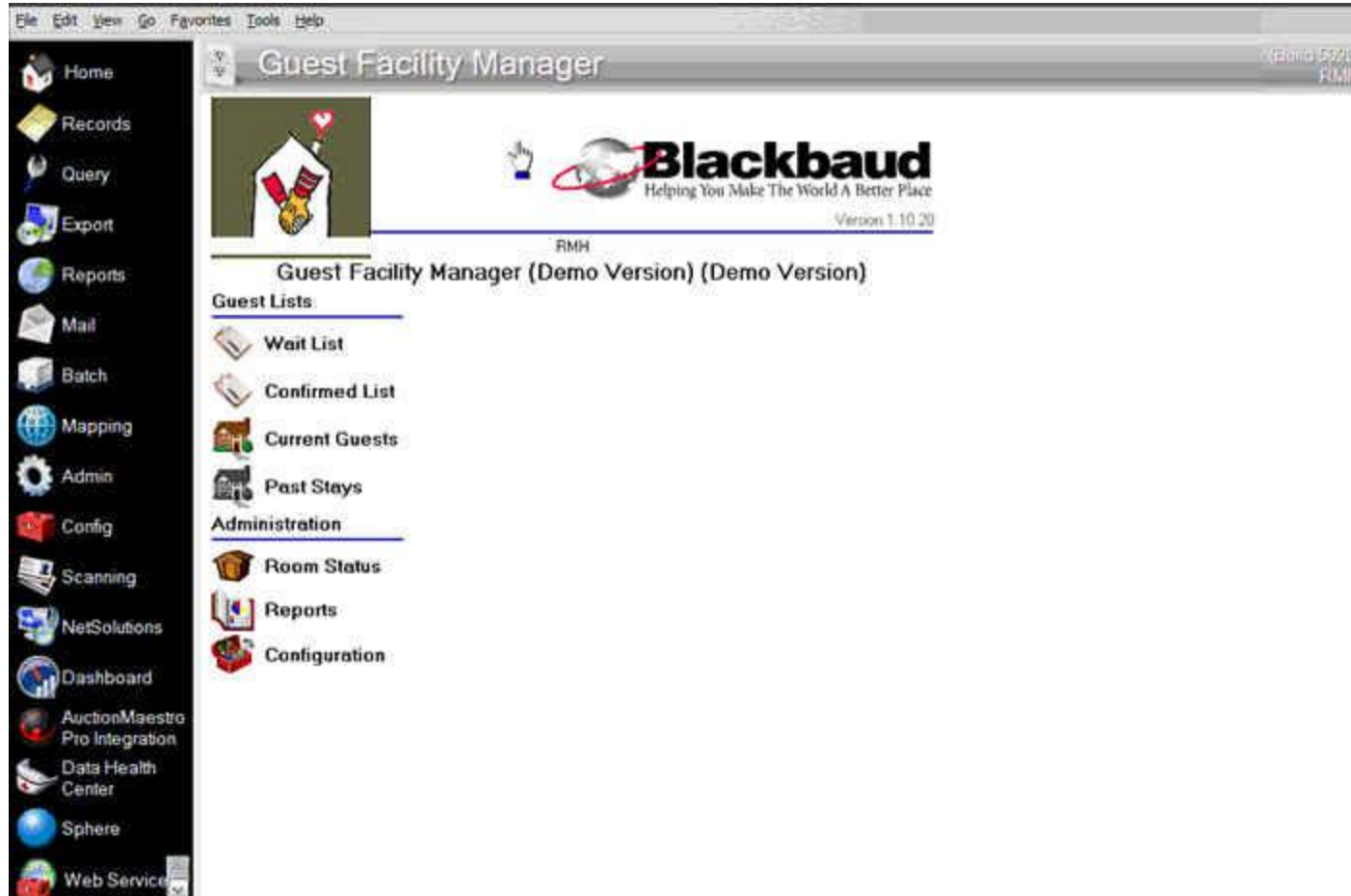
Sign into a job assignment

Make a timesheet entry

View upcoming opportunities

Update contact information

New Custom Solutions: RMH Guests Plug-In For Tracking Facility and Guest Management in The Raiser's Edge



Querying in RE7 : Creative Uses & More!

Hosted by: William Jankins
Solutions Engineer/ Product Expert

Benefits of Querying in The Raiser's Edge

With Query, you can...

Segment your database however you need to

Break down your database by any field you have tracked on a record

Use the query throughout the entire system once it's created

QUERY: THE BASICS

1. What is a Query?
2. Query Options
3. Duplicates in Queries
4. Static Versus Dynamic
5. Wild Cards
6. Query Types
7. Query Favorites
8. Query Operators
9. Combining Operators
10. Parentheses
11. Merging Queries
12. Using Reports & Mail to create queries
13. Troubleshooting Reports w/ Query
14. Using Queries created in RE7
15. Understanding Filters on Summary Fields

1. What is a query?

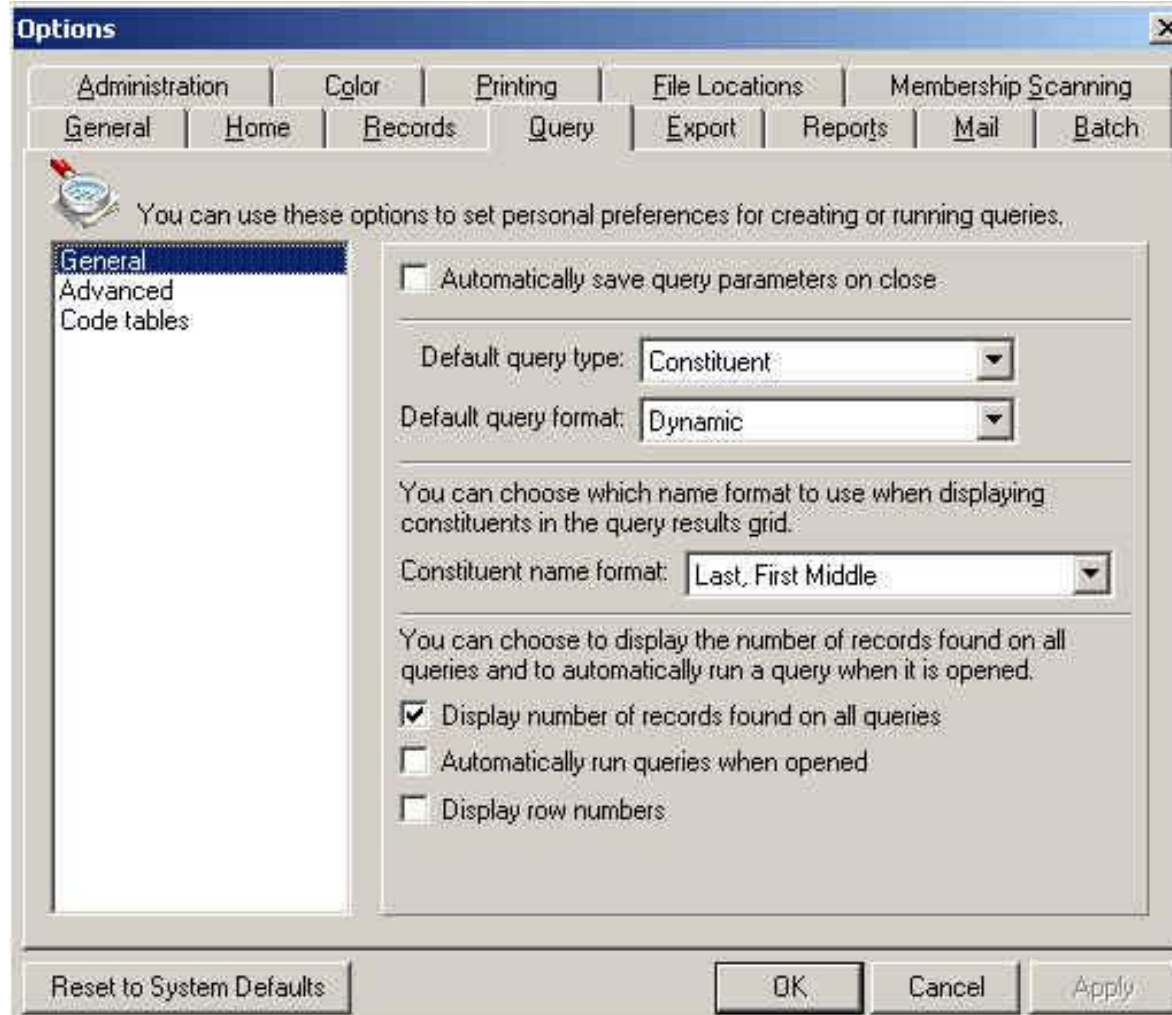
- A. A report?
- B. Another way to export data?
- C. A grouping of records?
- D. A breed of North-American tree frog?

The correct answer is:

C

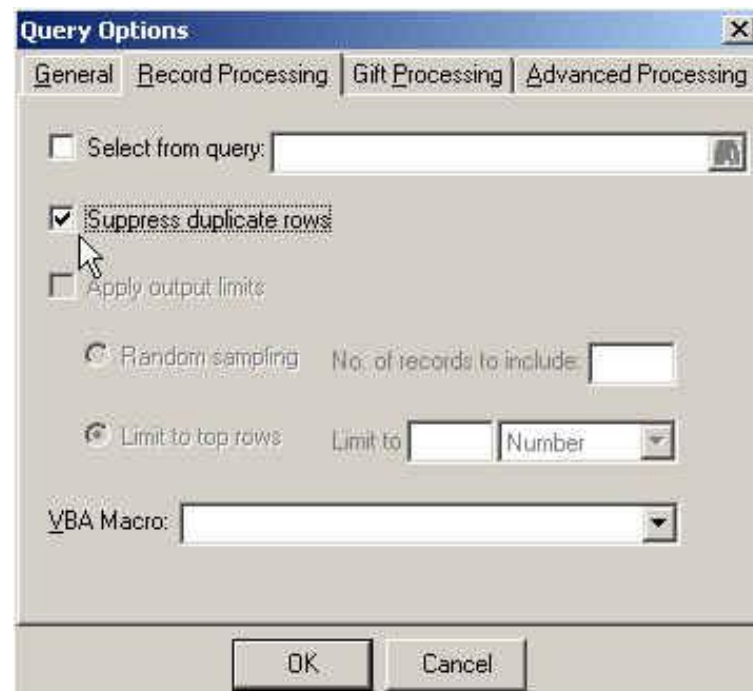
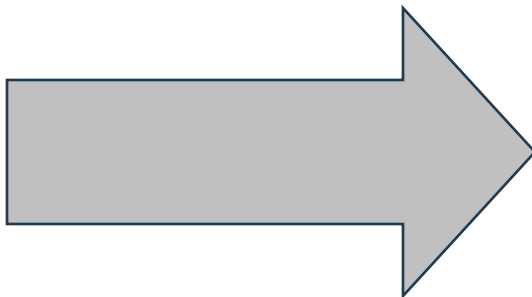
2. QUERY OPTIONS:

Found in Tools, User Options, Query Tab



3. DUPLICATES IN QUERY:

If your query output does not include one-to-many fields, use the **Suppress Duplicate Rows** (from the query, select Tools, Query Options) option to minimize duplicates.



4. STATIC VERSUS DYNAMIC:

Static Query: “snapshot” in time – can be refreshed

Dynamic Query: always refreshes itself when accessed – always has the most current data

5. WILDCARDS:

Question Mark (?): use the question mark symbol to replace a character.

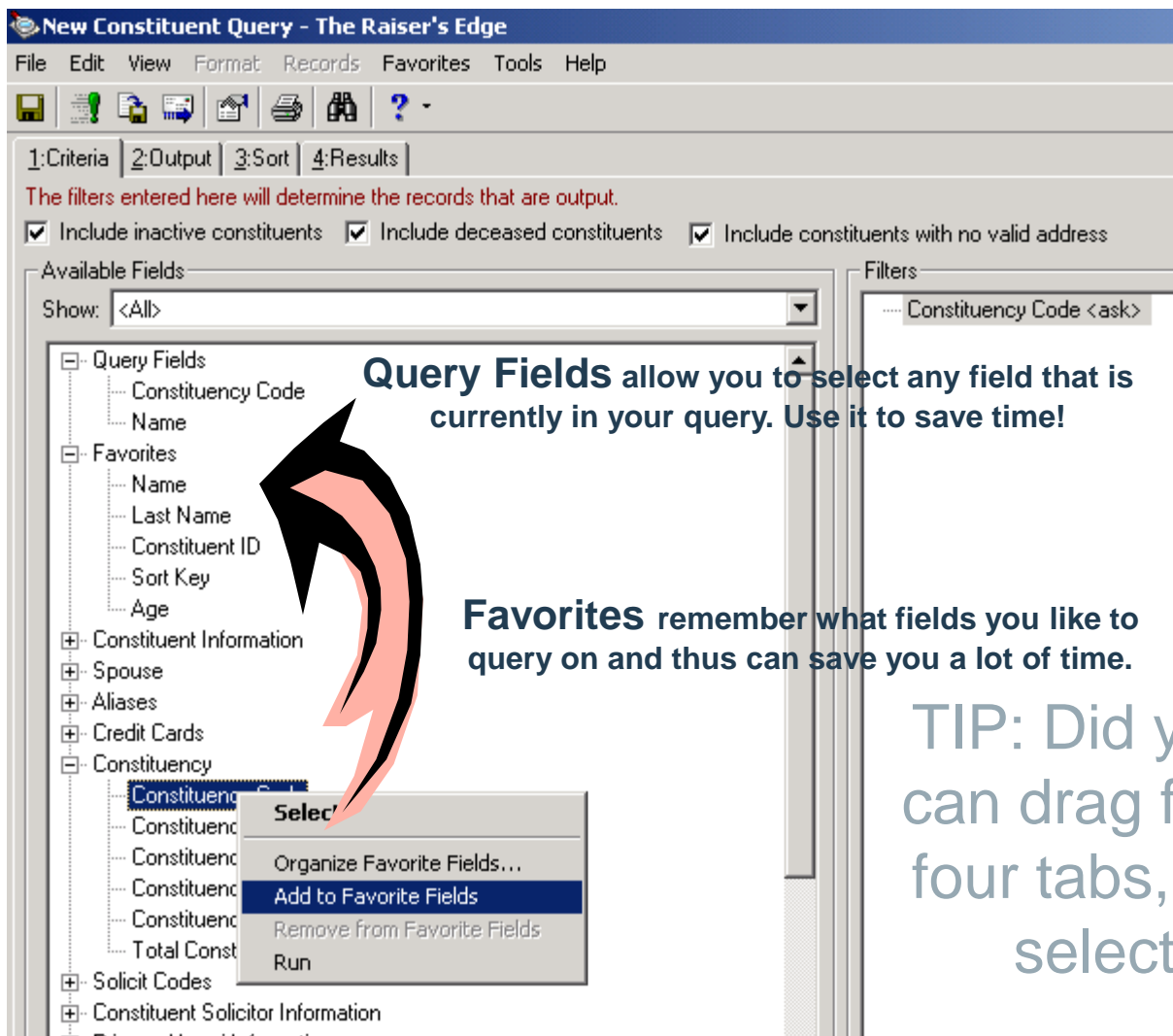
Asterisk (*): use the asterisk to replace a series of characters.

Brackets ([]): use brackets to query for a range of characters or to locate several characters. For example, use the criteria **Last Name** “begins with” [A-C] to locate all constituent records with a last name beginning with A through C.

6. QUERY TYPES: Not all queries have to be Constituent queries!

The image features a central screenshot of a software dialog box titled "Query". The dialog box has a blue header bar and a light gray body. It contains two dropdown menus: "Query type:" with "Constituent" selected, and "Query format:" with "Dynamic" selected. At the bottom of the dialog are "OK" and "Cancel" buttons. The background of the dialog box shows a magnifying glass over a document. Surrounding the dialog box are several large, orange, 3D-style text labels: "Fund", "Action", "Relationship", "Gift", "Participant", "Event", "Campaign", "Job", "Appeal", "Membership", "Individual", and "Organization".

7. QUERY FAVORITES:



8. QUERY OPERATORS:

Equals

Does Not Equal

Greater Than

Greater Than or Equal To

Less Than

Less Than or Equal To

One Of

Not One Of

Between

Not Blank

Blank

Not Between

Contains

Does Not Contain

Begins With

Does Not Begin With

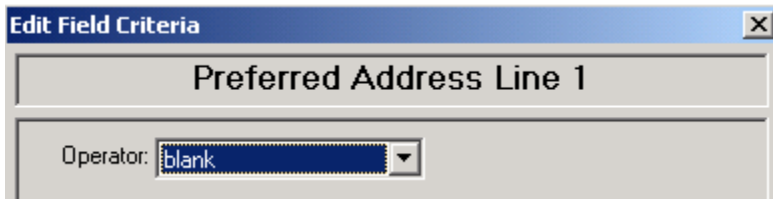
Like

Not Like

Sounds Like

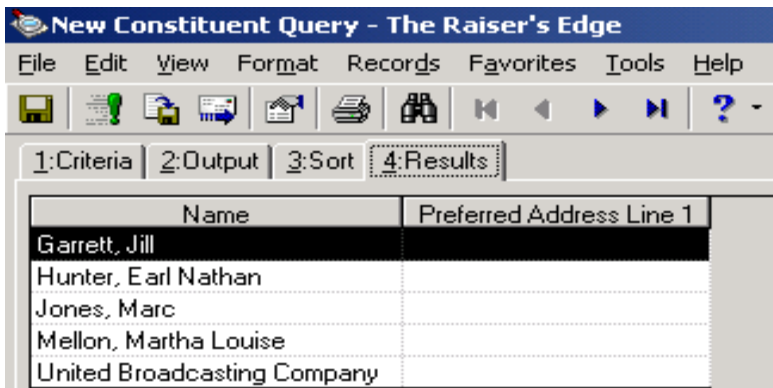
Ask

Cleaning up holes in the database with the BLANK operator:



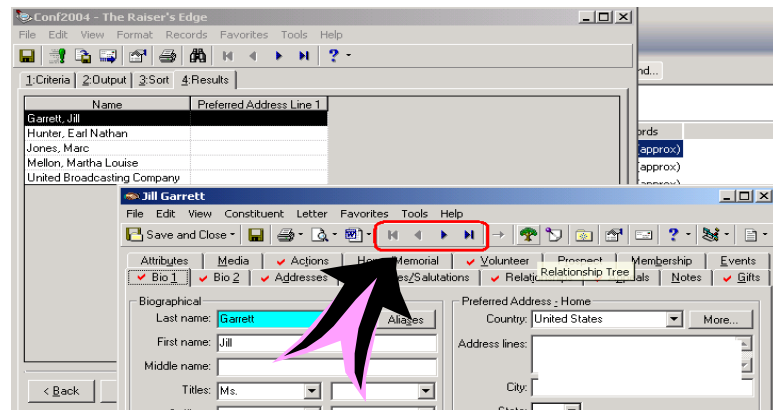
1

Create a DYNAMIC query using the BLANK operator on a field that is missing. For example: Address Line 1 Blank.




2

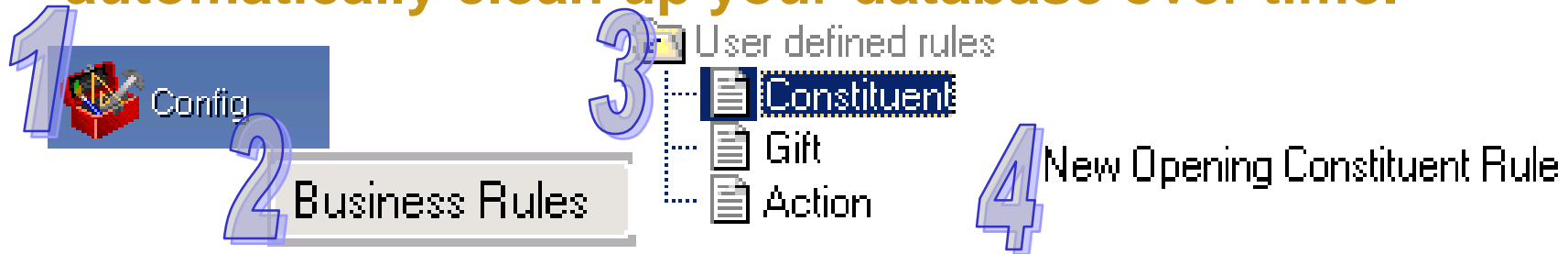
Go to the results tab and double click on a record to jump to that record.



3

Clean up records by filling out the blank fields, then use the  buttons to clean up the other records. If you have a large amount of records to clean, then a global change might be better. Or....

Use BLANK queries to create business rules that will automatically clean up your database over time.



5

New Rule for Opening Constituents

Rule name: Warn if somebody has missing address lines

Query name: Records with blank addresses

Message: This record currently has missing address information. Please correct this situation if possible. Thanks for helping clean up our database!

6

Opening Constituent Rule

This record currently has missing address information. Please correct this situation if possible. Thanks for helping clean up our database!

OK

Creative use of query operators:

Edit Field Criteria [X]

Preferred ZIP

Operator: **like**

Value: **?????-????**

OK Cancel

Zip **like** ?????-???? Will ensure that all records have a ZIP+4. You can then get larger postal discounts if you use this query for a mailing.

Edit Field Criteria [X]

Preferred ZIP

Operator: **begins with**

Value: **294**

OK Cancel

Zip **begins with** 294 will find people that live in several zip codes that begin with 294

Edit Field Criteria [X]

ZIP

Operator: **between**

Value 1: **29400**

Value 2: **31000-9999**

OK Cancel

Zip **between** 29400 and 31000-9999 finds all records that have a ZIP or a ZIP+4 in a geographical area.

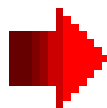
Creative use of query operators: The **ASK** Operator

1 Query format: Create a new **DYNAMIC** query

2 Edit Field Criteria
 Constituency Code
 Operator:

Select the field you want to query on and use the **ASK** operator

3 New Gift Detail and Summary Report
 File Edit Favorites Help
 General 2: Filters 3: Gift Types 4: Attributes 5: Ind. Address
 Include... **Ask constituency code**
 Include Gifts with these Dates
 Date to use:
 Date:



Query Name: Ask constituency code
 Description:
 The criteria for the following fields must be entered before the query can be processed. Enter the appropriate criteria and press Next to advance to the next field.

Constituency Code
 Operator:
 Value:
 Acknowledgee
 Alumnus
 Board Member
 Corporate Member
 Corporation\Business
 Current Parent
 Development Staff
 Donor

Run any task on the basis of your new dynamic **ASK** query and at the time of running the task, you get to select what you want

Creative use of query operators: The Ask Operator

What could you do with a **constituent** query like this?

The screenshot shows a dialog box titled "Edit Field Criteria" with a close button (X) in the top right corner. The field name "Birth Date" is displayed in a large font. Below it, the "Operator:" label is followed by a dropdown menu that has "<ask>" selected.

What could you do with a **gift** query like this?

The screenshot shows a dialog box titled "Edit Field Criteria" with a close button (X) in the top right corner. The field name "Gift Batch Number" is displayed in a large font. Below it, the "Operator:" label is followed by a dropdown menu that has "<ask>" selected.

Asking for too much? I don't think so!
You can use the **ASK** operator multiple times.



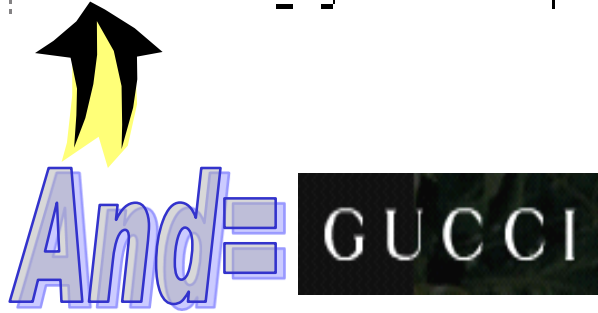
```

Constituency Code <ask>
AND Last Gift Date <ask>
AND Solicit Code Description <ask>
    
```

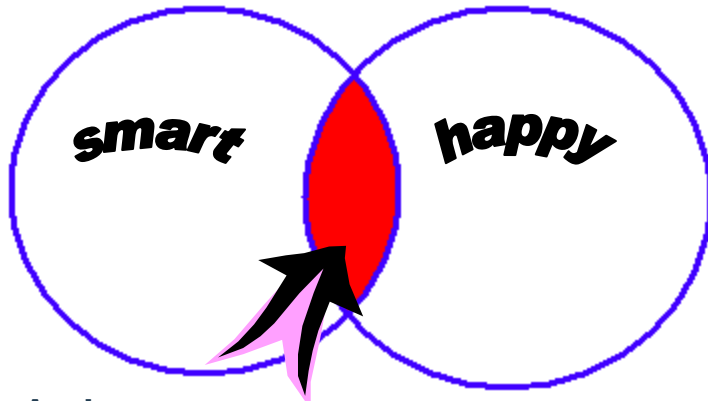
This query could give you Major Donors whose last gift was last calendar year and who asked you not to be phoned, but to be e-mailed.

9. COMBINING OPERATORS: And & Or:

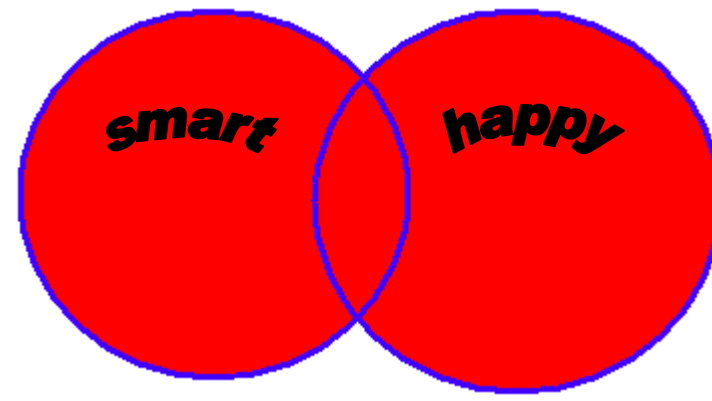
..... Constituency Description one of Alumnus, Employee
..... AND Gift Median_1 greater than or equal to \$150.00



..... Constituency Description one of Alumnus, Employee
..... OR Gift Median_1 greater than or equal to \$150.00



And is very exclusive. Think of it as the Gucci operator **GUCCI**. Only people which are both smart and happy will be included.



Or is very inclusive. Think of it as the K-Mart operator. Everybody is included, whether you are smart or happy or both!

10. PARENTHESES: When are they needed?

1 Rule Number One: There have to be 3 or more rows in your query

2 Rule Number Two: Parentheses are only needed if you are using both AND & OR in the same query

No parentheses are needed in the following query because of rule 2:

- Birthplace equals Berlin
- AND Gender equals Male
- AND Birth Date equals Next month (any year)

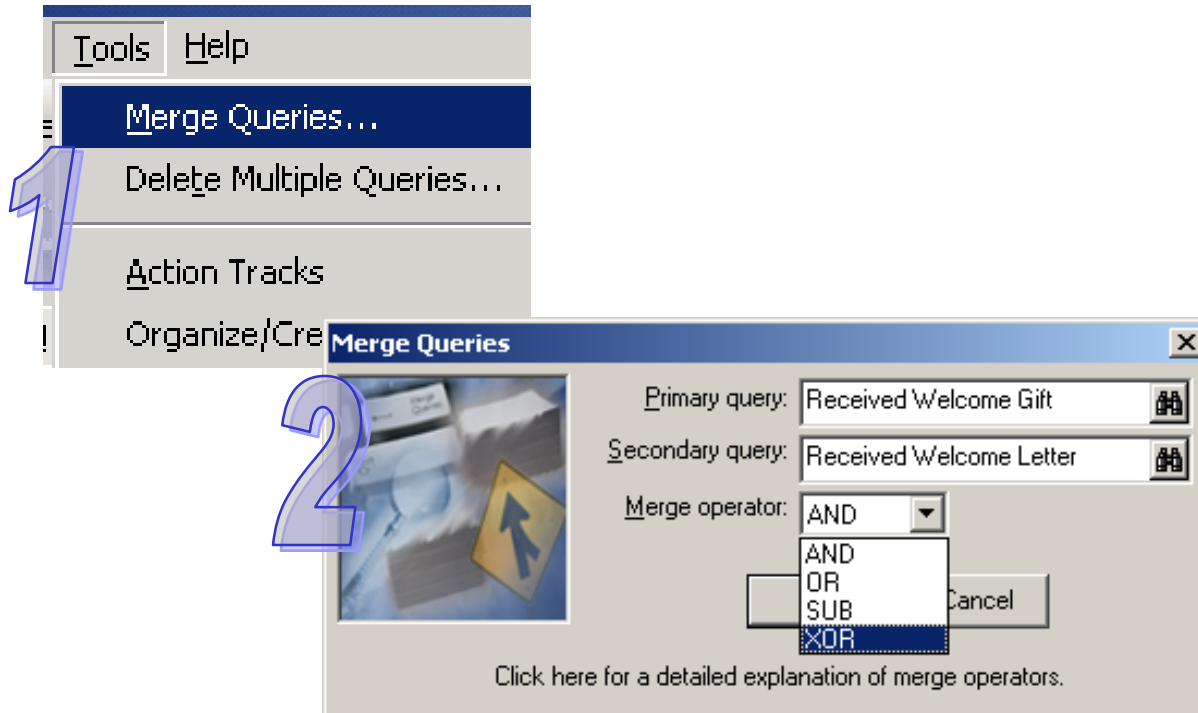
- (Birthplace equals Berlin
- OR Gender equals Male)
- AND Birth Date equals Next month (any year)

$$(2 * 4) + 6$$

- Birthplace equals Berlin
- OR (Gender equals Male
- AND Birth Date equals Next month (any year))

$$2 * (4 + 6)$$

11. MERGING QUERIES: using AND, OR, SUB, or XOR



You will get the following results if you use the merge operator:

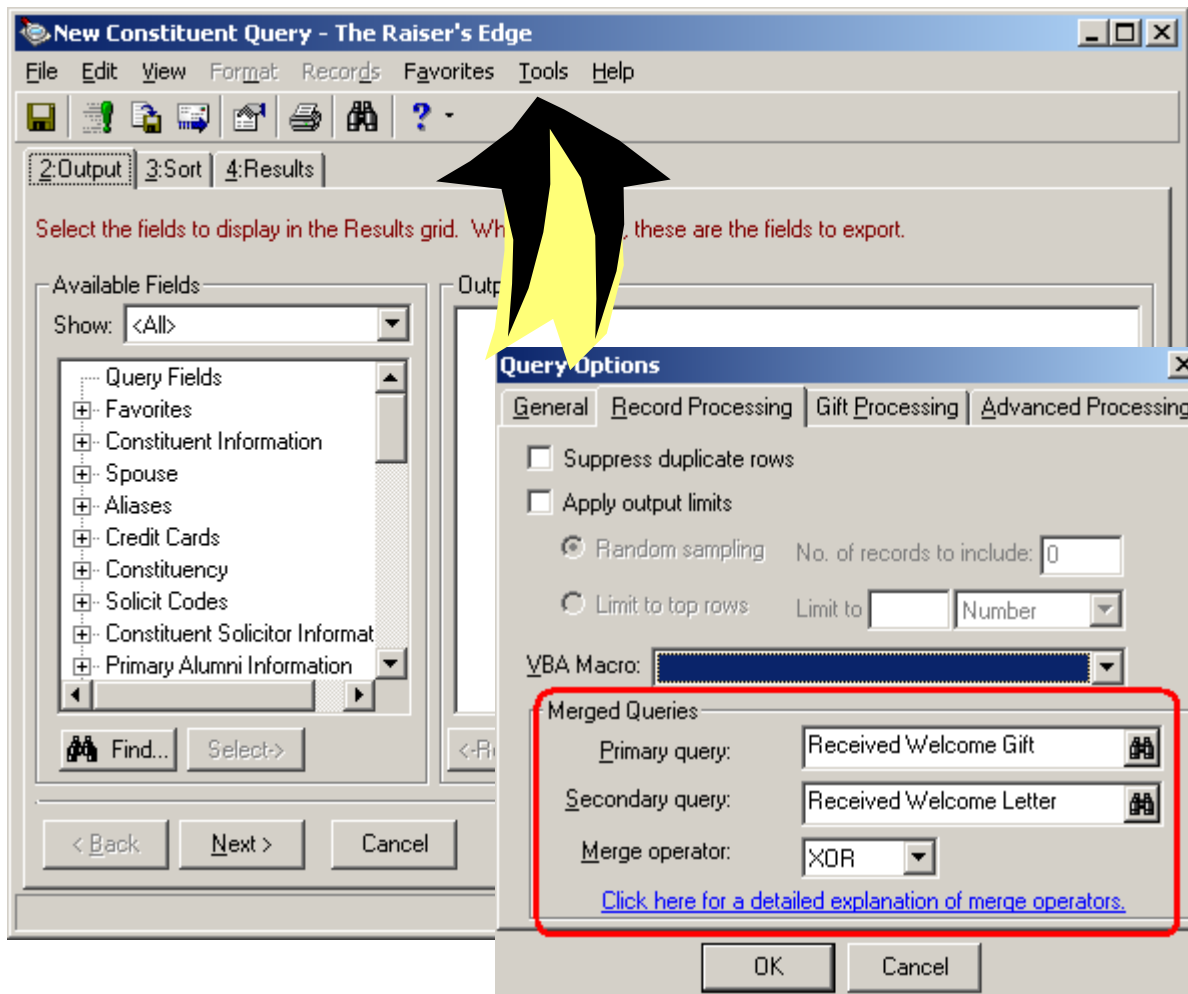
AND: People that received both a Gift and a Letter

OR: Everybody that either received a Gift or a Letter

SUB: People who received a Gift, minus people who received a letter

XOR: People that are in either query but not in both: People that either received the Gift OR the Letter, but NOT both.

What does a merged query look like? It looks like any other query, but has no Criteria tab.



Select Query Options from the Tools menu to see how a merged query was formed

12. REPORTS/MAIL TO CREATE QUERIES: Use reports to create queries!



New Comparative Report

File Edit Favorites Help

1: General | 2: Filters | 3: Gift Types | 4: Attributes | 5: Ind. Address | 6: Org. Address | 7: Format

Include... **All records**

Include Gifts with these Dates

Date to use: Gift date

Period	Date range	Start	End
1	Last calendar yr		
2	This calendar yr		

Credit Matching Gifts To

Donor MG Company Both

Create output query

Variance to Include

Increase

Decrease

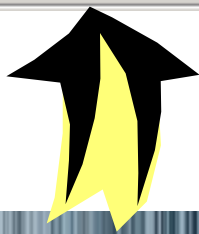
Both

Display Variance As

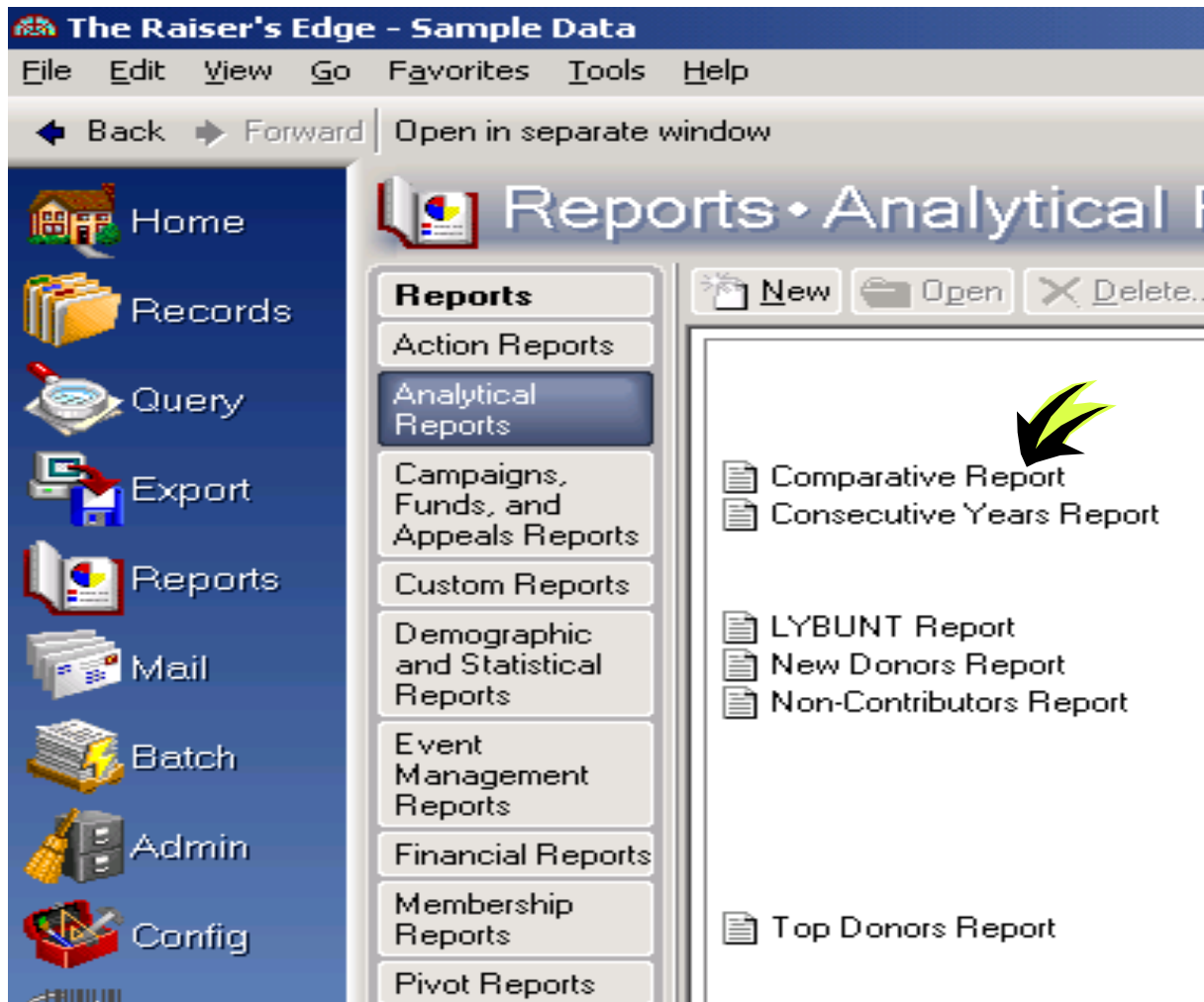
Percentage Report percentage changes of at least:

Currency Report currency changes of at least:

4



Other reports that can easily create meaningful queries for you:



Or let Mail create a query for you!

Create output query Is available in Mail functions. Start a Mail function, check this box and let Mail query for you by using the following filters:

<p>Head of Household Processing</p> <p><input checked="" type="radio"/> Mail only to constituents marked 'Head of Household'</p> <p><input type="radio"/> Mail to first constituent found</p> <p><input type="radio"/> Mail to both constituents separately</p>	<p>Include these Constituents</p> <p><input checked="" type="checkbox"/> Inactive constituents</p> <p><input type="checkbox"/> Deceased constituents</p> <p><input checked="" type="checkbox"/> Constituents with no valid address</p>
---	--



By using the grid below, this mailing may be filtered on the items shown in the Selected Filters column.

Filters	Filter Option	Selected Filters
Dates Last Chan...	Include All	<All Dates Last Changed>
Solicit Codes	Exclude Selected	Do not mail
Constituent Codes	Include Selected	Board Member

Include or Exclude Records With these Attributes

	Filter	Record Type	Category	Description
<input type="checkbox"/>	Include	Constituent	Committees	Finance
<input type="checkbox"/>	Exclude	Constituent	Interests	Cricket
<input type="checkbox"/>		Constituent		

Creative use of Mail functions: Use the Reminder Mail function to create a constituent query of people who have installments due.

New Reminders

File Edit Favorites Help

6: Org. Address 7: Gift Types 8: Format

1: General 2: Fields to Include 3: Filters 4: Attributes 5: Ind. Address

Reminder type: 3 column Per pledge One per page

Include... **All records**

Include Gifts with these Dates

Date to Use: Gift date

Date: This month

Include Gifts with these Amounts

Start amount: \$0.00

End amount: \$0.00

Include these Constituents

Inactive constituents

Deceased constituents

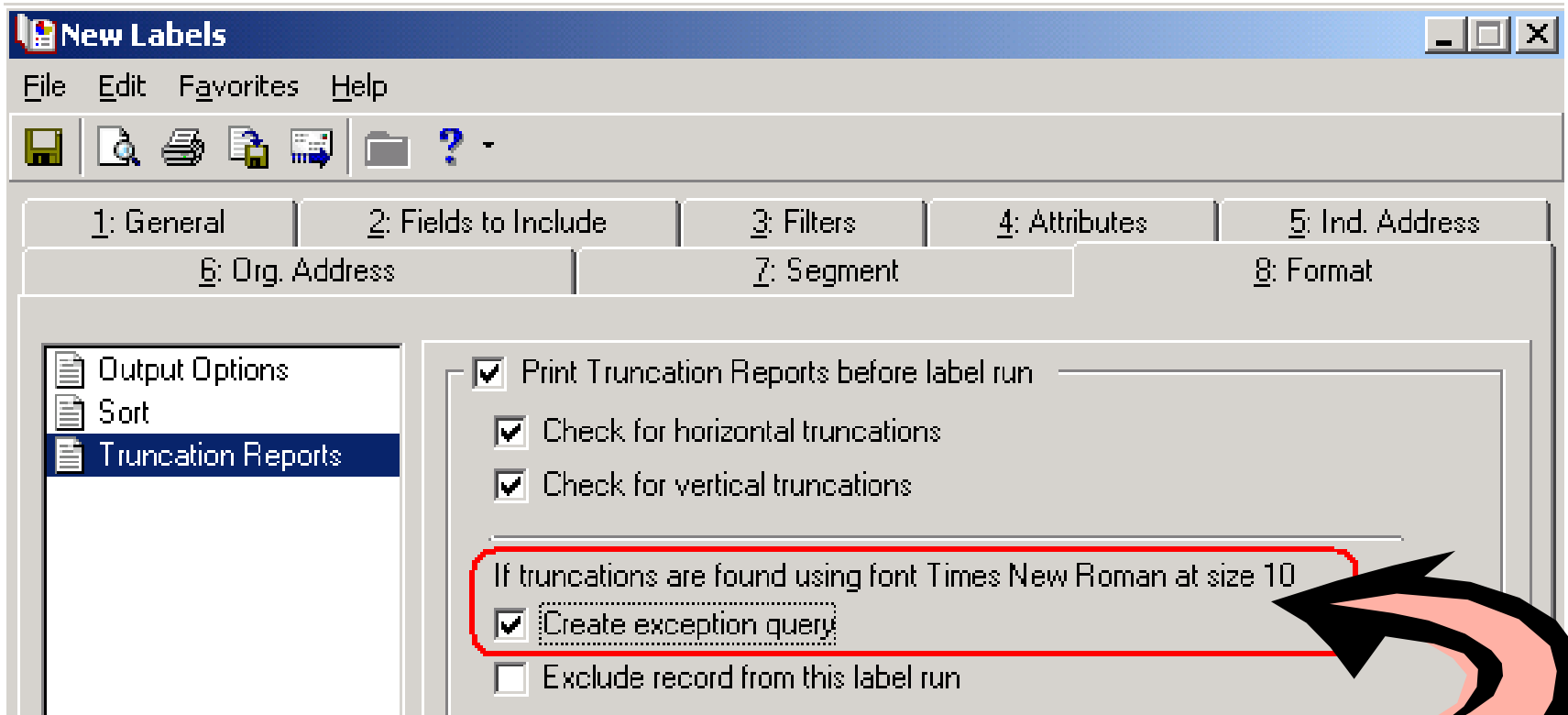
Constituents with no valid address

Run date: 07/27/2004

Create **Constituent** output query

< Back Next > Cancel Print Preview Layout

Let Mail create a query of truncated records, then run labels again on a smaller font, using that query!

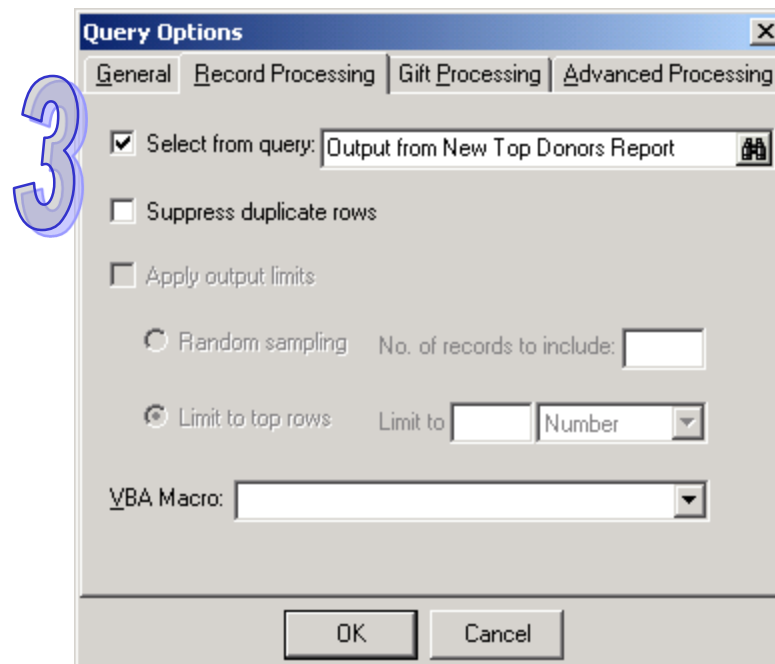
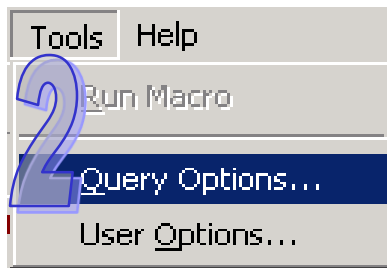
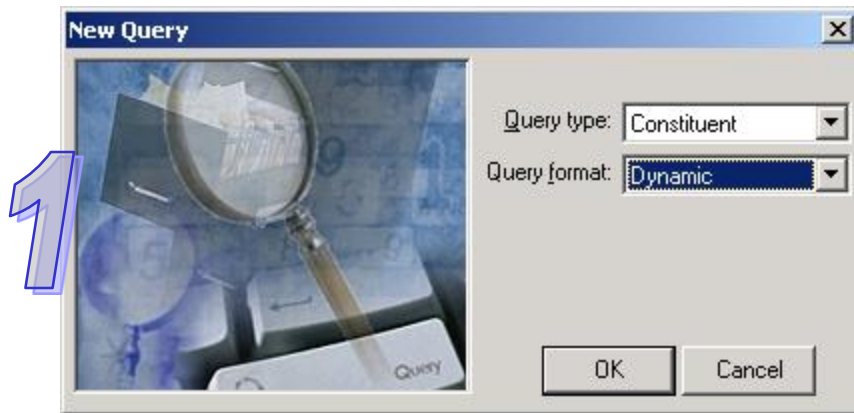


Run the labels again using this query, but this time on Times New Roman at size 8!

13. TROUBLESHOOTING REPORTS W/ QUERY

You have created two financial reports and there is a \$15,000 discrepancy between the grand totals. A clever way of figuring out what donors or gifts are causing this discrepancy, is to create output queries for both reports and then to merge these queries:

14. USING OUTPUT QUERIES CREATED BY REPORTS, MAIL or MERGES



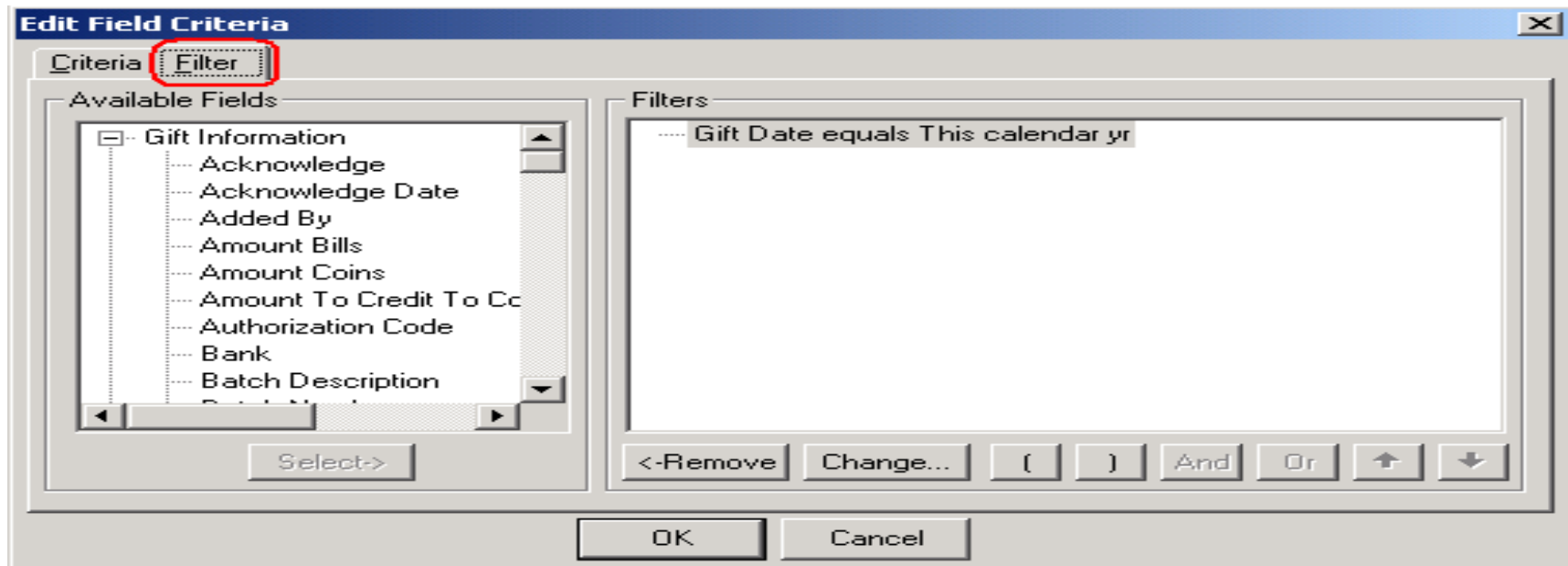
Creative use of queries: Basing a query on another query

The screenshot displays the 'New Constituent Query - The Raiser's Edge' interface. The menu bar includes File, Edit, View, Format, Records, Favorites, Tools, and Help. Below the menu is a toolbar with icons for saving, printing, and other functions. The main window has tabs for 1:Criteria, 2:Output, 3:Sort, and 4:Results. A red text instruction states: 'The filters entered here will determine the records that are output.' Below this are three checked options: 'Include inactive constituents', 'Include deceased constituents', and 'Include constituents with no valid address'. On the left, a tree view shows 'Available Fields' with a 'Show: <All>' dropdown. A 'Query Options' dialog box is open, showing the 'General' tab. It has a checked option 'Select from query:' with a dropdown menu set to 'Output from New Top Donors Report'. Other options include 'Suppress duplicate rows', 'Apply output limits', 'Random sampling', and 'Limit to top rows' (which is selected). The 'Limit to top rows' section has a 'Limit to' input field and a 'Number' dropdown. At the bottom of the dialog are 'OK' and 'Cancel' buttons. On the right, the 'Filters' section shows 'Constituency Code <ask>'. A Venn diagram is overlaid on the right side, consisting of two concentric circles. The outer circle is green and labeled 'All Records'. The inner circle is blue and labeled 'New top donors', representing a subset of the outer circle.

15. UNDERSTANDING FILTERS ON SUMMARY FIELDS:

1 Gift Total Amount_1 greater than or equal to \$500.00
AND Gift Date equals This calendar yr

2 Gift Total Amount_1 greater than or equal to \$500.00
Gift Date equals This calendar yr



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Phone: 800.443.9441

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Thank you for joining us!