



## Condensed Smart Query Definitions

**Constituents by committee/group membership:** returns constituents by committee or group, includes primary address

**UNC Alumni by school major degree and location:** returns list of selected parameters based on educational information

**UNC Constituent Gift recognition by designation and amount:** returns constituents with recognition by site, designation or department by date

**UNC Constituents by educational involvement:** returns list of constituents based on involvement listed on constituent profile (Greek life, athletics, housing on campus, clubs, etc)

**UNC Current Students by school, level, class, etc:** returns constituents by educational involvement, includes primary address

**UNC Designation List:** returns a list of designations by site, designation, department, designation name, FRS number, purpose type and date

**Event registrant by event and date:** returns a list of registered constituents name, ID & balance

**UNC Fundraising purposes with stewarded donors:** returns fundraising purposes with administrators and stewarded donors with no end date including purpose details, donor name and primary address

**UNC Interactions completed by date, site, owner, constituent:** returns completed interactions with status, comments, site, rating, employer, and address

**UNC Gift revenue payments by date and designation info:** returns revenue payment transactions at the application detail that includes constituent name and primary address information, shows more donor information than a report



## Steps to Complete a Smart Query

From Analysis, click Information library. The information library appears.

On the Queries page, click Add a smart query. The Select a Smart Query Definition screen appears.

Select the definition of the type of smart query instance to create. For information about the definitions for a smart query definition, see Smart Query Definitions above.

Click OK. The New Smart Query screen appears.

On the Parameters tab, specify the criteria of the records to include in the query results.

To view the query results and ensure the criteria and output appear as intended, select the Results tab.

Adjust your parameters as necessary.

On the Set save options tab, enter the naming convention (formula below) and description to help identify the query and specify the query's properties.

Click Save to save your query and see the results.