



Querying Tips for Constituent Information

Constituent Source View

The constituent source view gives you access to all constituent information such as biographical, address, educational history, prospect manager, and etc.

What is listed under constituents?

Located under Constituents is basic constituent biographical information – UNC ID (lookup id), name, formatted name, first name, middle name, last name, title, suffix, deceased, inactive, age, birthdate, gender, etc.

Constituents...

Where do I find the primary address?

Elements of the primary address (address, city, state, zip, country, etc.) are located here.

Constituents...Address (Primary)

Should I use State or State Abbreviation?

Because both state abbreviations and country abbreviations are in the State Abbreviation field, to alleviate confusion the recommendation is to use the State field when querying.

Constituents...Address (Primary)...State

How do I query for the primary HRC or geographical region?

Under Constituents, click the + beside Address (Primary). Then select Region Codes. Choose Region Code Value. (There is a drop down showing available values.)

Constituents...Address (Primary)...Region Codes...Region Code Value.

Where do I find the Advise record types?

Record types are now constituencies. (This field will show ALL constituencies assigned to a constituent.)

Constituents...Constituencies...Constituency

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Where do I find the primary constituency of a constituent?

A constituent can have only ONE primary constituency.

Constituents...UNC Demographic...Primary Constituency

Where is a prospect's rating?

Constituents...Prospect...Prospect status

Where can I find a prospect's prospect manager?

Constituents...Prospect...Prospect Manager...Name

How do I query for educational involvement?

Educational involvement is defined as an activity an alumnus was involved in while a student at UNC – Chapel Hill. (Examples: Morehead Scholar, baseball, football, sorority, fraternity, club sport, etc.)

Constituents...Educational Involvement...Name

How do I find primary email address?

Constituents...UNC Demographic...Primary Email Address

How do I find primary phone number?

Constituents...UNC Demographic...Primary Phone Number

How do I find the primary employer name?

Constituents...UNC Demographic...Employer

How do I find the primary job title?

Constituents...UNC Demographic...Job Title

Where is the Goes By Name?

Goes By Name is now Nickname.

Constituents...Nickname

Querying Tips for Constituent Information

How do I query for a special code?

You will need to know the required special code value(s) to use this query option as the codes are not available in a drop down.

Constituents...Special Codes...Special Code

How do I query for a special code using the special code description?

The description field contains drop down values.

Constituents...Special Codes...Description

How do I show a constituent's all-time recognition giving to UNC – Chapel Hill?

Constituents...UNC All-Time Recognition...Amount

How do I query for a constituent's all-time recognition giving to a specific department at UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift to the requested department will not display in the results.)*

In the 'Include records where' section place

Constituents...UNC Gifts by Department...Department Number

THEN

In the 'Results to display' section place

Constituents...UNC Gifts by Department...Amount

How do I query for a constituent's all-time recognition giving to a specific designation at UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift to the requested designation will not display in the results.)*

In the 'Include records where' section place

Constituents...UNC Recognition by Designation...Designation ID

THEN

In the 'Results to display' section place

Constituents... UNC Recognition by Designation...Amount

Davis Querying Tips for Constituent Information

How do I query for a constituent's all-time recognition giving during a specific fiscal year to UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift in the requested fiscal year will not display in the results.)*

In the 'Include records where' section place

Constituents...UNC Recognition by Fiscal Year...Fiscal Year

THEN

In the 'Results to display' section place

Constituents... UNC Recognition by Fiscal Year...Amount

How do I query for a constituent's all-time recognition giving to a specific designation and fiscal year at UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift to the requested designation during the requested fiscal year will not display in the results.)*

In the 'Include records where' section place

Constituents...UNC Recognition by Fiscal Year and Designation...Designation ID
AND

Constituents...UNC Recognition by Fiscal Year and Designation...Fiscal Year

THEN

In the 'Results to display' section place

Constituents... UNC Recognition by Fiscal Year and Designation...Amount

How do I query for a constituent's all-time recognition giving to a specific site and fiscal year at UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift to the requested site during the requested fiscal year will not display in the results.)*

In the 'Include records where' section place

Constituents...UNC Recognition by Fiscal Year and Site...Fiscal Year
AND

Constituents...UNC Recognition by Fiscal Year and Site...Site ID

THEN

In the 'Results to display' section place

Constituents... UNC Recognition by Fiscal Year and Site...Amount

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How do I query for a constituent's all-time recognition giving to a specific site at UNC – Chapel Hill? *(If you use this field, constituents that do not have a gift to the requested site will not display in the results.)*

In the 'Include records where' section place
Constituents...UNC Recognition by Site...Site ID

THEN

In the 'Results to display' section place
Constituents... UNC Recognition by Site...Amount

What are solicit codes?

Solicit codes indicates a constituent's wish on not receiving solicitation/communication pieces and delivery methods. Davie Marketing efforts will allow you to set this option without including in the query output. *Ask for help when using solicit codes.*