



## **Smart Query Definitions**

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1. Smart query definition name: **UNC Constituent gift recognition by site, designation, dept**

Smart query definition description: Returns constituents with recognition by site, designation or department by date

New Smart Query

ParametersResultsSet save options

Effective date between:

and:

Designation Site ID:

Designation...

\*

Designation Lookup ID:

Designation...

\*

Department/Report code 2:

Department/...

\*

Recognition Amount between:

\$0.00

and:

\$0.00

Help

SaveCancel



2. Smart query definition name: **UNC Gift revenue payments by site, designation, etc.**

Smart query definition description: Returns revenue payment transactions at the application detail level that includes constituent name and primary address information, not to be confused with recognition.

**Edit Smart Query - ALL FYXX Gift Revenue Smarty Query**

Parameters Results Set save options

Date between:

and:

Post Date between:

and:

Purpose Site ID:  Purpose Site...

Designation Lookup ID:  Designation...

FRS Number/Report Code 1:  FRS Number...

Department/Report Code 2:  Department/...

Purpose Type:  Purpose Type

Repository:  Repository

Batch number:  Batch number



### 3. Smart query definition name: **UNC Designation list.**

Smart query definition description: Returns a list of designations by site, designation, designation name, purpose type, date, and PeopleSoft Chartfield String fields

New Smart Query	
Parameters	Results
Designation Lookup ID:	Designation ... 806270
Designation Name contains:	
Type:	Type
Start date:	mm/dd/yyyy
PS Business Unit:	PeopleSoft B...
PeopleSoft Fund:	PeopleSoft F...
PeopleSoft Source:	PeopleSoft S...
PeopleSoft Account:	PeopleSoft A...
PeopleSoft Department:	PeopleSoft D...
	PeopleSoft Department:
	PeopleSoft Program:
	PeopleSoft Cost Code 1:
	PeopleSoft Cost Code 2:
	Purpose Site:



4. Smart query definition name: **UNC Fundraising purposes with stewarded donors by administrator**

Smart query definition description: Returns fundraising purposes with administrators and stewarded donors with no end date including purpose details, donor name and primary address

New Smart Query	
Parameters	Results
Purpose Administrator Record:	PeopleSoft Account:
<input type="text" value="Purpose Ad..."/>	<input type="text" value="PeopleSoft A..."/>
<input type="text" value="*"/>	<input type="text" value="*"/>
Purpose Type:	PeopleSoft Department:
<input type="text" value="Purpose Type"/>	<input type="text" value="PeopleSoft D..."/>
<input type="text" value="*"/>	<input type="text" value="*"/>
Purpose Lookup ID:	PeopleSoft Program:
<input type="text" value="Purpose Loo..."/>	<input type="text" value="PeopleSoft P..."/>
<input type="text" value="*"/>	<input type="text" value="*"/>
PS Business Unit:	PeopleSoft Cost Code 1:
<input type="text" value="PeopleSoft B..."/>	<input type="text" value="PeopleSoft C..."/>
<input type="text" value="*"/>	<input type="text" value="*"/>
PeopleSoft Fund:	PeopleSoft Cost Code 2:
<input type="text" value="PeopleSoft F..."/>	<input type="text" value="PeopleSoft C..."/>
<input type="text" value="*"/>	<input type="text" value="*"/>
PeopleSoft Source:	Purpose Site:
<input type="text" value="PeopleSoft S..."/>	<input type="text" value="Purpose Site"/>
<input type="text" value="*"/>	<input type="text" value="*"/>



5. Smart query definition name: **UNC Alumni by school, degree and location**

Smart query definition description: Returns living UNC alumni by school, degree, city, state, country and county; includes ex-mats and looks at primary address

**Edit Smart Query - ALL FYXX Alive UNC Alumni by Degree and Primary Address Smart Q...**

Parameters Results Set save options

Education School:

Class between:

and:

Education Level:

Education Degree:

Education Degree Type:

City:

State:

Country:

County:



6. Smart query definition name: **UNC Alumni by school, major, degree and location**

Smart query definition description: Returns living UNC alumni by school, major, degree, city, state, country and county; includes ex-mats and looks at primary address

New Smart Query

ParametersResultsSet save options

Education School:

Class between:

and:

Education Level:

Education Le...

\*

Education Degree:

Education D...

\*

Education Major/Minor:

Education M...

\*

Education Degree Type:

Education D...

\*

State:

State

\*

Country:

Country

\*

County:

County

\*



7. Smart query definition name: **UNC Constituents by educational involvement**

Smart query definition description: Returns constituents by educational involvement, includes primary address

**New Smart Query**

Parameters Results Set save options

Deceased:

Inactive:

Involvement Type:

Involvement Name:

Involvement Start Date between:

and:

Involvement End Date between:

and:

Help Save Cancel





8. Smart query definition name: **UNC Current students by school, level, class, etc.**

Smart query definition description: Returns current student constituents with education information and primary address

A screenshot of a "New Smart Query" dialog box. The dialog has a title bar with "New Smart Query" and window control buttons. Below the title bar are three tabs: "Parameters" (selected), "Results", and "Set save options". The "Parameters" tab contains several input fields: "Class Of between:" with a text box, "and:" with a text box, "School:" with a dropdown menu, "Department:" with a table-like structure containing a header "Department" and a row with an asterisk and a text box, "Program:" with a table-like structure containing a header "Program" and a row with an asterisk and a text box, and "Degree Type:" with a table-like structure containing a header "Degree Type" and a row with an asterisk and a text box. At the bottom left is a "Help" button with a question mark icon. At the bottom right are "Save" and "Cancel" buttons.

**New Smart Query**

Parameters Results Set save options

Class Of between:

and:

School:

Department:

Department
* <input type="text"/>

Program:

Program
* <input type="text"/>

Degree Type:

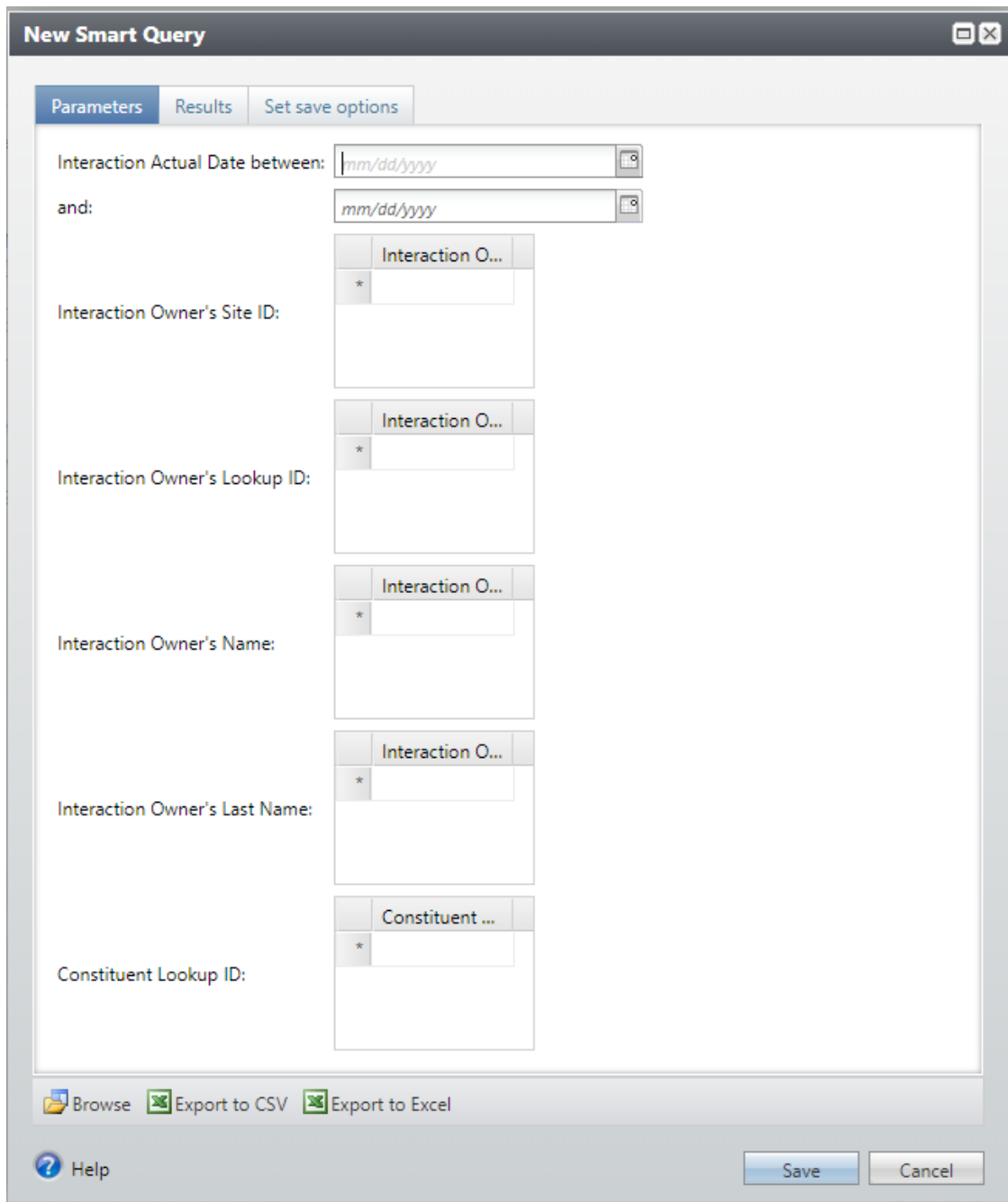
Degree Type
* <input type="text"/>

? Help Save Cancel



9. Smart query definition name: **UNC Interactions completed by date, site, owner, constituent**

Smart query definition description: Returns completed interactions with status, comments, site, rating, employer, and primary contact info (does not include pending steps)



The image shows a "New Smart Query" dialog box with three tabs: "Parameters", "Results", and "Set save options". The "Parameters" tab is active. It contains several input fields for defining a smart query:

- Interaction Actual Date between:** A date range selector with a placeholder "mm/dd/yyyy".
- and:** A date range selector with a placeholder "mm/dd/yyyy".
- Interaction Owner's Site ID:** A dropdown menu labeled "Interaction O..." with a search icon.
- Interaction Owner's Lookup ID:** A dropdown menu labeled "Interaction O..." with a search icon.
- Interaction Owner's Name:** A dropdown menu labeled "Interaction O..." with a search icon.
- Interaction Owner's Last Name:** A dropdown menu labeled "Interaction O..." with a search icon.
- Constituent Lookup ID:** A dropdown menu labeled "Constituent ..." with a search icon.

At the bottom of the dialog, there are three buttons: "Browse", "Export to CSV", and "Export to Excel". Below these buttons is a "Help" button with a question mark icon. At the bottom right, there are "Save" and "Cancel" buttons.



10. Smart query definition name: **Constituents by committee/group membership**

Smart query definition description: Returns constituents by committee or group, includes primary address

**New Smart Query**

Parameters Results Set save options

Group/Committee Name contains:

Is Current Member?:  ▼

Is Former Member?:  ▼

Member Start Date between:

and:

Member End Date between:

and:

Help Save Cancel



11. Smart query definition name: **Event registrants by event and date**

Smart query definition description: Returns events with registered constituents name, ID and balance

A screenshot of a "New Smart Query" dialog box. The dialog has a title bar with "New Smart Query" and standard window controls. Below the title bar are three tabs: "Parameters" (selected), "Results", and "Set save options". The "Parameters" tab contains three input fields: "Event record:" with a search icon, "Date changed between:" with a calendar icon, and "and:" with a calendar icon. At the bottom left is a "Help" button with a question mark icon. At the bottom right are "Save" and "Cancel" buttons.

**New Smart Query**

Parameters Results Set save options

Event record:

Date changed between:

and:

? Help Save Cancel



12. Smart query definition name: **UNC Unit Annual Downgrade Smart query**

Smart query definition description: Returns donors that have gift recognition to a site, designation, or PS department for both the current and previous fiscal year, but level of support has decreased.

A screenshot of the 'New Smart Query' dialog box. The dialog has a title bar with 'New Smart Query' and window control buttons. It contains three tabs: 'Parameters' (selected), 'Results', and 'Set save options'. Under the 'Parameters' tab, there are five input fields: 'Current FY:' (text box), 'Selection By?:' (dropdown menu with 'Site' selected), 'Site:' (dropdown menu), 'Designation ID:' (text box), and 'Department ID:' (text box). At the bottom of the dialog, there are three icons with labels: a folder icon for 'Browse', a CSV icon for 'Export to CSV', and an Excel icon for 'Export to Excel'. Below these is a 'Help' button with a question mark icon. On the bottom right, there are 'Save' and 'Cancel' buttons.

**New Smart Query**

Parameters Results Set save options

Current FY:

Selection By?:

Site:

Designation ID:

Department ID:

Browse Export to CSV Export to Excel

Help Save Cancel