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Query Builder User Guide It's Your Data, Pull Your Reports How You Want July, 2017

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www.charityengine.net



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Overview

CharityEngine, at its core, is a data-driven solution. Data is the key to understanding how your donors and contacts relate and interact with you. The Query Builder tool is a robust option that provides over 9,000 fields that can be used as query filters, as well as report output.

In addition, any created query can be used as a filter in another query. This allows for a powerful ability to segment your audience.

Locating Queries

From you Dashboard, select the Automation & Workflow option.



From the General category, choose the Queries option.

$^{\heartsuit}$ Automation & Workflow \oplus				
🗘 General	Contacts	n Opportunities		
Queries	Merge Contacts	Stages		
Data Enrichment	De-Dupe People	Tracks		
Import & Export	De-Dupe Organizations	Steps		
Scheduler	Merge History	Types		
See more »		See more »		





This loads the Query Search & Manage page. From here, you can locate all existing Queries. Queries can be reused and scheduled to recur on a regular basis.

[♥] back Queries	Create New ~	Advanced Filter 🥪 📔 More 🐱	0 ⊞ % ⊖ ≣
ACTIVE FILTERS: Last Run: 04/01/2017 • to: 04/07/2017 11:59 pm App Database ‡ \$	Dates Last Week ‡		
ID NAME TYP 8413 Testing FTP Cor 8398 Patrick's GR EVNT: Gra	Active Filters: Displays the filters currently active on the page. App: Allows you to filter the queries based on the application they are running on. Database: Allows you to filter the queries based on the database they are running on. Dates: Limits the displayed queries based on creation date.	LASTRUN	ACTIONS ***

The Advanced Filter provides options to locate specific queries. Make the appropriate changes and click Apply.

Id		Name		Date	04/01/2017	0					Yes
to 04/07/2017 1	-59 om	Last Run	0	In		0				Scheduled	
		5-15 C		0.4-0						Delete	
									cu	EAR	АР
									cu	EAR	AP
The fields p	resent allo	w you to search	n for a que	ery basec	l on seve	ral dif	ferent pieces	of infor	matio	n.	API
The fields p ID: Search	resent allo cy the ID r	w you to search number of the q	n for a que uery.	ery basec	d on seve	ral dif	ferent pieces	of infor	matio	n.	API
The fields p ID: Search Name: Sear	resent allo by the ID r ch by the	ow you to search number of the q name of the qu	n for a que uery. ery.	ery basec	d on seve	ral diff	ferent pieces	of infor	mation	n.	AP





Creating a New Query

Click Create New in order to build a new query.

[⇔] back Que	ries				Create New X	More +	2 ⊞ 0\$ ⊖ ≦
ACTIVE FILTERS:	Last Run: 04/01/2017 0 to: 04/07/2017 11: Database	Dates		Filter Query Query (L	egacy)		
ID	NAME	туре	TOTALS	SCHEDULES	DATE	LAST RUN	ACTIONS
8413	Testing FTP.	Contacts	Results: 0 Filters: 1 Fields: 5	Campeigns: 0 Exports: 1	4/6/2017		
8398	Patrick's GR EVNT	Grassroots Events	Results: 0 Filters: 1 Fields: 5	Campaigns: 0 Exports: 0	4/4/2017		

If you are using the new interface, select the Query option. If you are using the old interface, select Query (Legacy). This document provides instructions on the new interface.

Filter: Choose the application for the	Choose Query Type
query.	Filter Contacts 💠 Search
Select: Choose the database for the query.	Select O Contacts
	Addresses
These selections determine the output.	Email Address
donated, choose Contacts. If you want a	Households
list of all transactions, choose	Mailing Lists
Click Continue.	SMS





The new interface is consolidated into one page for building your query.

Search database Contact Person Organization Opt-in Lists Tags	DROP SELECT FIELDS HERE	0 8 ^
▶ Groups		
First Transaction	TILIER	
Most Recent Transaction	DROP FILTER FIELDS HERE	
Most Recent Email View		
WealthEngine	DATA SHOW 20 T #PREVIEW OPAGE	►RUN LE 🔨
	RUN QUERY	

Let's break down the elements of this page one at a time.







Selecting Fields for Output

The top section in this interface allows you to designate what fields you want to be listed in your reports results. Drag the fields from the left-hand column into the Select Fields Here.

Search database	SELECT O 🖉
✓ Contact	DROP SELECT FIELDS HERE
Full Name	
Date Created	
isActive	

This includes these items in the report in the order in which you place them. (You can drag them back and forth to update the order).



Each filed has a drop-down arrow that provides some additional options for the fields.

Set Formula: Allows you to set alterations for this field. For names it allows you to capitalize the first letter by default. For donation amounts it allows you to set it to sum, provide averages, etc.

Set Value if Blank: Allows you to set what should appear in an email using this query as the audience in the event this field is blank. (I.e. the Contact record has no first name).

Roll Up Dimension: If you are creating a query that is applying a formula to a numerical value field (i.e. sum all of these donations), this allows you to designate which fields should be used to aggregate the individual records. In order to work correctly, the query requires all non-formula fields to be a roll up item.







Advanced Field Options

Frequently, reports are used to help update additional systems. Some of the challenges faced in these circumstances are the need to conform to an import template that is a hold-over from a legacy system and/or cannot be changed.

This problem is complicated when the template requires information that is not stored in CharityEngine, or where a column must always have the same value.

The updated interface provides a way to address both items.

SELECT (6) O					
Date Created 🐱	Payment Amount 🕞	Category ~	Contact First Name 🗸	Contact Last Name 🗸	Free Form Field 🗸







Selecting Filters (Defining Your Audience)

Adding fields as a filter works identically to adding it as a field. Simply drag-and-drop the filters you would like to use to define your audience into the filter section. As you do, you'll need to provide some definitions and values for the query to compare against in order to build your results.

- Contact	
Id	
Full Name	
Date Created	
isActive	1
Priority Id	FILTER 🖬 🍠
Priority	DDOD FILTED FIELDS HEDE
Status Id	DROP FILTER FIELDS HERE

For example, if you wanted your query to provide you all Contacts who are Active in the system, accept Email, but do not accept physical mail you would set your filters as pictured below:







Dynamic Filters

For on-going reporting, some filters need to become subjective rather than objective (i.e. you want the dates for "Last Week" rather than a specific 7 day date range that doesn't move in further repetitions of the report.

Selecting the Formula beaker icon switches this filter over to a subjective stance.







Advanced Filter Sets

In more complex queries, the And operator may not be appropriate for all of the filters. Since it means that the results must meet all of the listed criteria, it prevents you from looking at multiple sets of data in the same report. In the legacy query builder, we addressed this by using parenthesis to note the sets of filters and the query would apply them from inside the parentheses outward.

In this interface, we use a much similar concept. These are filter groups that you can create and easily modify.

In the example below, there is an advanced set of filters that looks for all confirmed transactions that have not been refunded or voided that come from two different forms. Because each transaction in CharityEngine can only be tied to one form, the standard And operator for these two filters prevents any results from display. Use the + button to add a filter set, and then add the form filters to that set.

Click on the operator to change it to the Or operator.

FILTER (2)	
OR-	form Id T Equals T enter number or list (e.g. 1,2,3)
	form Id Fquals Finter number or list (e.g. 1,2,3)
	DROP FILTER FIELDS HERE
	DROP FILTER FIELDS HERE

The additional filters –the ones that apply to all the transactions from either form- are placed outside of the field set with the And operator.

)		
OR-	Form Id T Equals T enter number or list (e.g. 1,2,3)	
Γ L	Form Id 🛛 👻 Equals 👻 enter number or list (e.g. 1,2,3)	
Payment Co	nfirmed True	
Voided or Ri	sfunded Y Equals Y Faise	
	DROP FILTER FIELDS HERE	





Preview the Query

At the bottom of the query page is an option to run a dynamic preview. The legacy system required you to save the query and do a full export in order to preview your data; this is no longer the case. Click on the arrow in the pane to run the query as it stands above.







Save the Query

Click the Save button on the topright of the query screen. Provide the name for the query and a brief description.

We do highly recommend including a description to that the purpose of the query can be quickly identified.

Once you've entered this information, click Save & Close.

Query Settings	
Name	
Description	
	6
	CANCEL SAVE & CLOSE SAVE

Immediate Functions

In addition to setting up an export after finalizing the query, you can use the down arrow beside the Save button. You can use this export the data immediately (even without saving the query) as well as jump to other options.

SAVE -					
Clear All					
New Query					
Export Data					
Mail Initiative					
Email Blast					
Automated Email					





Exporting a Query

From you Dashboard, select the Automation & Workflow option.

CharityEngine	Q famh.	
GUICKLING -	BIS Sandbox Dashboard	
1 Contesta	111170014, 11.3335.444	\$256,690
11 Donations	dr Live Feedr	Otave State ===================================
🕞 Cinquigne	Reations ()	Response Channes + Online \$3
burn 4	10 11	Meil 10
alle Advocecy		Word of Moudh 50
	62	
Chardwordtes & Logistics	27	80 90 140
Accounting		
Analytica	Hilbhan	and the feature of a
en Automation & Michilton	November 2014 C 3	
usternit Technit	Seen Mon Toe Weel Thu Prr Set	Salar States
Halp Cuntur		

From the General category, choose the Queries option.

General	Contacts	n Opportunities
Queries	Merge Contacts	Stages
Data Enrichment	De-Dupe People	Tracks
Import & Export	De-Dupe Organizations	Steps
Scheduler	Merge History	Types
See more »		See more »

Locate the query you wish to export using the filter or the Advanced Filter. From the right-hand action column, select Export.

Арр	t Database	C Last Week	\$				
ID	NAME	түре	TOTALS	SCHEDULES	DATE	LAST RUN	ACTIONS
8413	Testing FTP	Contacts	Results: 0 Filters: 1 Fields: 5	Campaigns: 0 Exports: 1	4/6/2017		Export Provew
8398	Patrick's GR EVNT	Grassroots Events	Results: 0 Filters: 1 Fields: 5	Campaigns: 0 Exports: 0	4/4/2017		Email Blast Copy Edic Edic (legacy) Delete
Display 10	20 50 100 500		1 to 2 of 2				First F Email Settings Last Schedule



From the Job Type drop-down, select the Export option and then click the Next button.



The query displays in the drop-down window. Double-check to make sure the correct query is selected and then click the Next button.



Next, select the data format the export. Click the Next button.



Notifications can be sent when the export job has been completed, and the file can be included. Your address loads by default, but any address can be included. Enter than and click the Add button. Once all the addresses have been added, click the Next button.

Email Address		ADD
Notification List		Remove Selected
	-	



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Provide a name for the export job. You can also enter the file name format to ensure that the file comes out with a name specific to this job rather than a generic export name.

Best Practice Tip: Name your Export the same as your query. This makes it easier to locate in the future!

N	lame		
	Start	Ø	
Descri	ption		
		Ŀ.	
File Name Fo	rmat	T.	(tor example ^^MM^^/
FTP SETTINGS			

Review the settings and click Finish.

Data Job Wizard - Please conf	irm your job settings and click finish to start
Туре	Export
Export From	Custom Query (Testing FTP)
Name	test
Start	4/11/2017 3:03:55 PM
File Name Format	
Data File Type	Tab Delimited (Excel)
	<





Please note, you are brought back to the list of queries while the export process runs. In order to download your file, select the Import & Export section.

CharityEngine	Q Search						
QUICK LINKS Y	∍ [©] _{back} Import	/Export Job	5				
Automation & Workflow Q	ACTIVE FILTERS: De	nte: 04/01/2017 O	to: 04/11/2017 11:59	pm O Auto Created: no O			
General	Туре	Status		User	Dates		
General	🔽 Import 💟 Expo	rt		\$	Month to Date	•	
Queries							
Data Enrichment							
	ID	туре	USER	DETAILS			STATU5
Import & Export							
Scheduler	187151	Export	Chris R Bryant	Name: test			Finished
				Data Source:	Testing FTP		
Change Logs				Pile Formac.	LACEI		

Your export is listed along with any other recent exports. Check the status column. If you export is not listed as Finished you'll need to refresh the page every few minutes to update the export's status. Once set to Finished you'll be able to use the right-hand action column and select Download. To pull the record in your set format.

From here, you can also schedule the query to run on a regular basis.

ID TYPE USER DETAILS STATUS DETAILS ACTIONS 187151 Export & Chris R Bryont Name: text Data Source: Testing FTP File Format: Excel Finished Size: 4 4/11/2017. Size: 4 4/11/2017. 186045 Import & BIS Global Name: dfdf Destination: People Finished Size: 1 4/7/2017 Down	Type	Status Export	User	Dates Month to Date				
187151 Export AC Chris & Bayant: Name: test Data Source: Testing FTP File Format: Excel Finished Size: 4 4/11/2017. 186045 Import & BIS Global Name: dfdf Destination: People Finished Size: 1 4/7/2017	ID	TYPE	USER	DETAILS	STATUS	DETAILS	DATE	ACTIONS
186045 Import ▲BIS Global Name: dfdf Finished Size: 1 4/7/2017 Destination: People Bad: 0	187151	Export	Chris R Bryant	Name: test Data Source: Testing FTP File Format: Excel	Finished	Size: 4	4/11/2017.	Schedule Rerun
Dupes: 0 Processed: 1	186045	Import	A BIS Global	Name: dfdf Destination: People	Finished	Size: 1 Bad: 0 Dupes: 0 Processed: 1	4/7/2017	Download





Scheduling an Export

Once you have built a query and created the first export, you can set the export to run on a regular basis.

Setting a New Schedule

To set up a new schedule, use the export you created for your query. On the right-hand column, select the Schedule option.

ID	TYPE	USER	DETAILS	STATUS	DETAILS	DATE	ACTIONS
187151	Export	Chris R Bryant	Name: test Data Source: Testing FTP File Format: Excel	Finished	Sizer 4	4/11/2017	Schedule
186045	Import	BIS Global	Name: dfdf	Finished	Size: 1	4/7/2017	Rerun
							Download
nter a n lis parti formati	ame for t icular sch ion click	his schedule. Yo edule, if desired. Create.	u may set a start and end date for Once you have entered the	Gen	eral		
					Active	🔘 yes	no
est Pra nd Que	ctice Tip: ry!	Keep the name	the same as the associated Export		* Name		
					Data Job	187151	
					Start Date		0
					End Date		0
					Description		





Once you've created the schedule, you are able to view a new tab. Click the Triggers tab to set the frequency of this report.

Select the interval you want from the first drop-down (Week, Month, etc.) and then select the specific point within that interval (Sunday, 1st of the month, etc.). Click Add.

eneral	Triggers			
Select	Week	÷.	Sunday	\$ ADD
		,	· · · · · · · · · · · · · · · · · · ·	

Updating a Schedule

Schedules live in their own place in the Automation & Workflow application. You can alter the schedule by navigating to that page and locating your schedule. (Clicking Schedule from the export file creates a new schedule. It does not alter the existing one).

Locate the schedule you wish to manage. From the right-hand action column select the Manage option.

Automation & Workflow Q	Туре	td \$ Search		Name Search		Dates All	\$	
General 🗸								
Queries	ID NAME		TYPE	DETAIL		TRIGGERS	DATES	ACTIONS
Data Enrichment	1107		-	Data Sauran 1	Tastian ETD	0		
Import & Export	1107 best		Export	Active: Yes	resung FTP	^o		
Scheduler				Email Delivery	r: No			Manage Delete
This allows you to ch updating the triggers any needed changes	ange the end dat s, if needed. Onc , click Update.	e as well as e you have made		General	Triggers Active * Name Data Job Start Date End Date	yes test 187151	no	0





Export Job Email Settings

Once you have set up the schedule, the export provides the options to detail to whom reports should be sent.

From the Export's right-hand action column, select Settings.

197151 Export Lap Chris R Bryant Name: test: Finished Size: 4 4/11/2017	ID	TYPE	USER	DETAILS		STATUS	DETAILS	DATE	ACTIONS	
Name: Populates with the name assigned to this export. Email List: Populates within anyone already set to receive email notifications. You can add additional emails by separating with a comma. File Name Format: Populates with the export's settings, but can be updated. Email Delivery Settings: Expand this section to mark if the report should be sent as an attachment and to assign a read/write password for the file. In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts.	187151	Export	Chris R Bryant	Name: test Data Source: Te File Format: Exc	esting FTP cel	Finished	Size: 4	4/11/2017	Schedule	
Name: Populates with the name assigned to this export. Email List: Populates within anyone already set to receive email notifications. You can add additional emails by separating with a comma. File Name Format: Populates with the export's settings, but can be updated. Email Delivery Settings: Expand this section to mark if the report should be sent as an attachment and to assign a read/write password for the file. In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts. File Name Format (for exam File Name Format Email Delivery Settings									Download Settings	
Email List: Populates within anyone already set to receive email notifications. You can add additional emails by separating with a comma. File Name Format: Populates with the export's settings, but can be updated. Email Delivery Settings: Expand this section to mark if the report should be sent as an attachment and to assign a read/write password for the file. In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts. Email Delivery Settings: Export As Email Attachment * Attachment Read Password	Name: Po export.	pulates with tl	ne name assigned to	o this	Gene	ral Email				
File Name Format: Populates with the export's settings, but can be updated. Email Delivery Settings: Expand this section to mark if the report should be sent as an attachment and to assign a read/write password for the file. In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts. File Name Format Contain personal information of your contacts. Export As Email Attachment Attachment Read Password	Email List receive em emails by s	: Populates wi nail notificatior separating wit	thin anyone already ns. You can add add h a comma.	set to itional		Start D	* Name test ate/Time 04/1	1/2017 03:05	pm 🥝	
Email Delivery Settings: Expand this section to mark if the report should be sent as an attachment and to assign a read/write password for the file. In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts.	File Name settings, b	Format: Pop ut can be upda	ulates with the expo ated.	ort's		De	scription			
In order to maintain PCI compliance, a read password should be included on any files that contain personal information of your contacts.	Email Deli mark if the and to assi	ivery Settings e report shoulc ign a read/writ	: Expand this section be sent as an attack e password for the f	n to nment ile.						
Email Delivery Settings Export As Email Attachment Attachment Read Password Attachment Neite Deserved	In order to password contain pe	maintain PCI should be incluersonal information	compliance, a read uded on any files tha ation of your contac	at ts.		File Name	e Format			(for example
Export As Email Attachment	с.				• E	mail Delivery Set	tings			
* Attachment Read Password						Export As Email Att	achment			
Attachment Micite Decruped						* Attachment Read P	assword			
Attachment write Password						Attachment Write P	assword			

