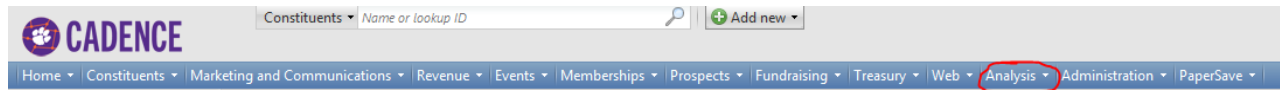


## SMART QUERIES

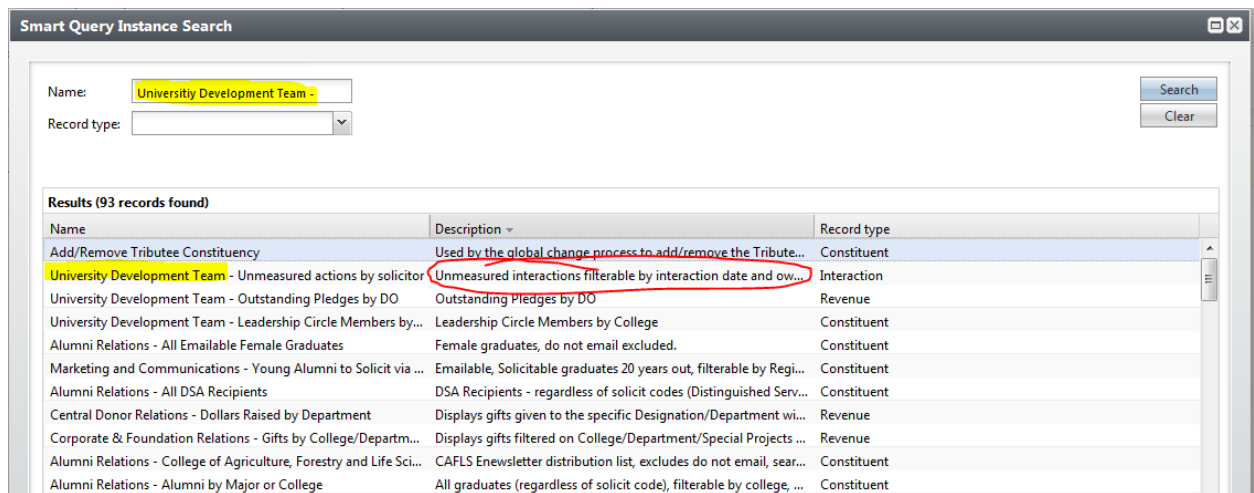
A smart query is a tool that enables you to filter on specific fields from a subgroup previously defined by IT.

- You will not be able to view or edit the criteria used in the original definition.
- Read the DESCRIPTION of each smart query to understand the original criteria.

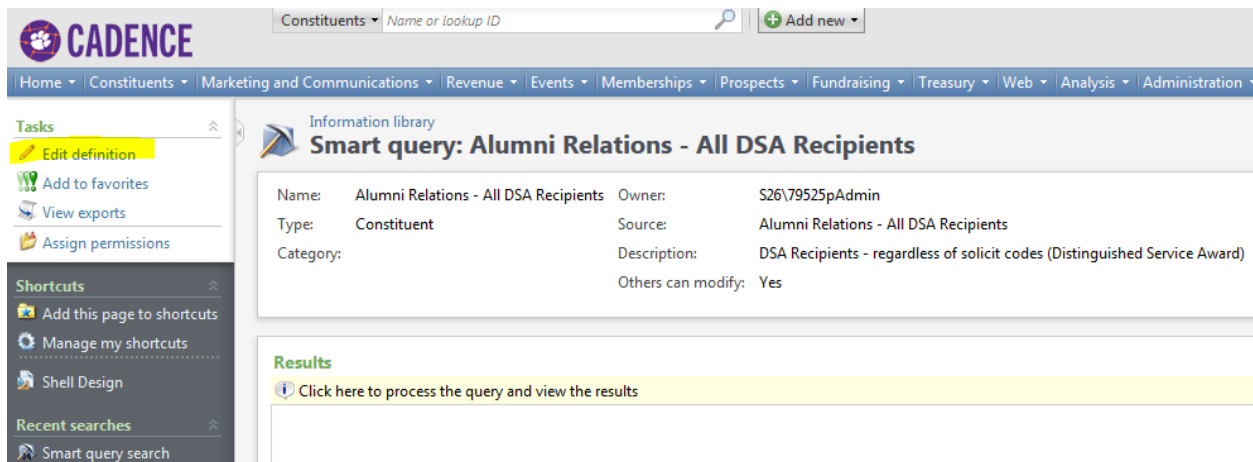
To locate smart queries, click on 'Analysis' from the blue toolbar and then open the Smart Query Search under the Information Library Subsection.



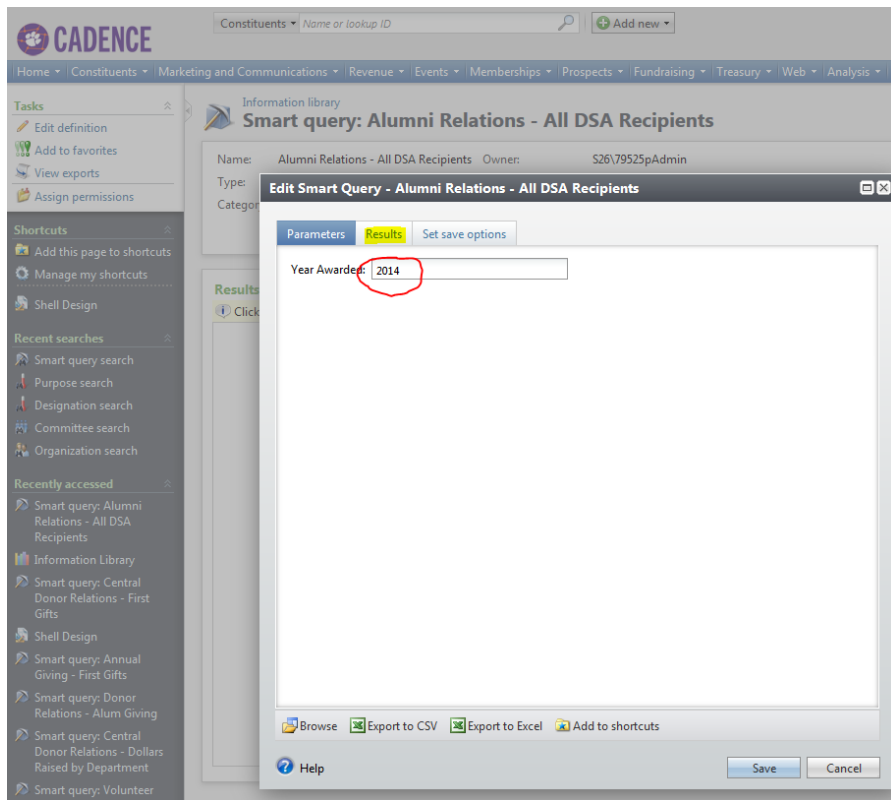
- Most queries are prefaced with the team name that requested it.
- However, all Cadence users can open and run any smart query in the system.



After double-clicking your smart query selection, click on the link to 'Edit Definition' in the upper left-hand corner.

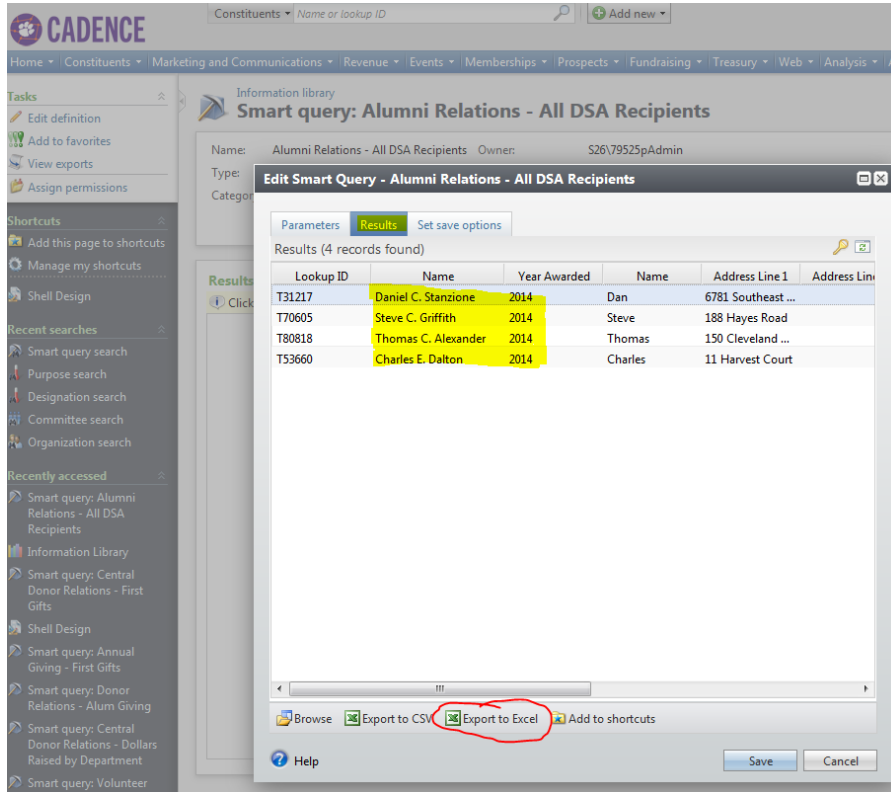


Only some fields will be filterable. If you leave a field blank, it will provide all available values in the results. In the example below, entering '2014' will display DSA recipients honored in 2014. If you do not add any year in the filter field, DSA recipients from all years will be displayed.



The second tab for 'Results', will display the output as requested in the original query.

To export **all the results** to a .csv or .xls file, select one of the options at the bottom of the 'Results' tab of the 'Edit Definition' window (circled in red). Exporting results from here does not limit the export to only 500 results.



Exporting from the results panel on the smart query page will only return the first 500 results, so using the 'Edit Definition' window is recommended.

Information library  
**Smart query: Prospect Research – Research List Criteria**

Name: Prospect Research – Research List Criteria Owner: S26/vbennae79525p OData: Get OData link  
Type: Constituent Source: Prospect Research – Research List Criteria  
Category: Description: Restrictions: Constituents and their spouses both have a blank prospect manager. Constituents without "Do not contact except Mandatory" and "No solicitation" solicit codes. Filterable on Primary County, State, and TY IPTAY Level.  
Others can modify: Yes

**Results** (Over 500 records found. Only the first 500 rows are shown.)

Page 1 of 10

Browse Download to CSV Download to XLSX

Lookup ID	Name	Primary County	Primary State
8-10158234	Military		
8-10927726	Anna Mariella		
8-10927727	Chris T. X121	Martin	Florida
8-10927728	Rob Hannigan		
8-10927732	Gary K. Kleister	Anderson	South Carolina
8-10927732	Gary K. Kleister	Anderson	South Carolina

If you want to drill down/research specific records in the output, select 'Browse', then select a 'View' to open a frame that allows you to see each record in the results.

**Edit Smart Query - Alumni Relations - All DSA Recipients**

Parameters Results Set save options

Results (4 records found)

Lookup ID	Name	Year Awarded	Name	Address Line 1	Address Line 2
T31217	Daniel C. Stanzione	2014	Dan	6781 Southeast ...	
T70605	Steve C. Griffith	2014	Steve	188 Hayes Road	
T80818	Thomas C. Alexander	2014	Thomas	150 Cleveland ...	
T53660	Charles E. Dalton	2014			

Choose page definition

Open the selected record with:

- Page Definition
- Affiliated Education History Page
- Alumni Listing
- Committee Fundraising and Giving Report Page
- Committee Member Page
- Committee Page
- Communication Preferences
- Constituent Correspondence Page
- Constituent Documentation Page
- Constituent Employment History Page
- Constituent Funds Received Page
- Constituent Group Memberships Page
- Constituent History Page
- Constituent Interactions Page
- Constituent Page**
- Constituent Profile Page
- Constituent Recognition Default Page

OK Cancel

**CADENCE** | Constituents | Name or lookup ID | Add new | Welcome, S261daniel79525p

Home | Constituents | Marketing and Communications | Revenue | Events | Memberships | Prospects | Fundraising | Treasury | Web | Analysis | Administration | PaperSave

**Tasks**

- Add payment
- Add pledge
- Add recurring gift
- Add membership
- Add Dr. Daniel C. Stanzone, Ph.D. 1967 to a group or household
- Edit lookup ID
- Edit link to user
- Remove spouse
- Write letter from template
- Write a letter
- Delete Dr. Daniel C. Stanzone, Ph.D. 1967
- Data processing request
- BBS duplicate registration

**View as**

- Fundraiser

**More information**

- Wealth and ratings
- Web dashboard pages

**Reports**

**Dr. Daniel C. Stanzone, Ph.D. 1967**

Individual | Lookup ID: T31217

Constituencies: Alumnus | Alumnus Parent | Donor at some time | Planned Giver | Tributee | Tribute Donor | Event registrant | Fundraiser | Prospect

**Personal Information**

Dr. Daniel Charles Stanzone, Ph.D.  
Nicknames: Dan  
Maiden:

**Contact Information**

Primary phone: +1 (772) 225-6487 (Personal)  
Primary email: dstanzone@gmail.com (E-mail)

**Addresses** (8 of 7)

6781 Southeast Harbor Circle  
Stuart, FL 34986-1964  
Home (Current)

**Primary Relationships**

Spouse: Ms. Lisa Votta  
Household: Daniel Stanzone and Lisa Votta  
Primary business: Bell Laboratories

**Documentation and Interactions**

Notes: 18  
Media links: 0  
Attachments: 26  
Interactions: 246

**Memberships**

ID: Status:  
Expiration:  
Level:  
Member since:

**Summary** | Contact | Personal Info | Relationships | Revenue | Online Info | Memberships | Prospect | Education | Documentation and Interactions | Communications | History | Attributes | Events | Smart Fields | PaperSave

Recent revenue

Date	Type	Amount
12/17/2019	Donation	\$500.00
12/7/2018	Donation	\$500.00

**Browse query results (4 records found)**

Previous record | Next record | View records with: Constituent Page

Lookup ID	Name	Year Awarded	Name	Address Line 1	Address Line 1	City	State	Zip	Email Address(es)
T31217	Daniel C. Stanzone	2014	Dan	6781 Southeast Harbor Circle		Stuart	Florida	34986-1964	dstanzone@gmail.com
T70605	Steve C. Griffith	2014	Steve	188 Hayes Road		Prosperity	South Carolina	29127-9156	Scgtl@bellsouth.net
T80618	Thomas C. Alexander	2014	Thomas	150 Cleveland Drive		Wahalla	South Carolina	29691-1868	alexandersoffice@rr
T33660	Charles E. Dalton	2014	Charles	11 Harvest Court		Greenville	South Carolina	29601-4409	charles.dalton@blu

Be aware that saving the query does not permanently save your filters. It will be overwritten every time a different user runs this smart query. (You will need to re-enter your parameters every time you want results).

To request a smart query or add a specific field to an existing smart query, submit a HelpDesk Ticket