## **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.

<b>CADENCE</b>	Constituents   Name or lookup ID	P Add new •	
Home • Constituents • Marketing	and Communications 🝷 Revenue 🝷 Events	🔹 Memberships 🔹 Prospects 🔹 Fundraising 👻 Treasury 👻 Web	• Analysis • Administration • PaperSave •

- 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.

art Query Instance Search		
Name: Universitiy Development Team -		Search Clear
Results (93 records found)		
Name	Description -	Record type
Add/Remove Tributee Constituency	Used by the global change process to add/remove the Tribute	Constituent
University Development Team - Unmeasured actions by solicitor	Unmeasured interactions filterable by interaction date and ow	Interaction =
University Development Team - Outstanding Pledges by DO	Outstanding Pledges by DO	Revenue
University Development Team - Leadership Circle Members by	Leadership Circle Members by College	Constituent
Alumni Relations - All Emailable Female Graduates	Female graduates, do not email excluded.	Constituent
Marketing and Communications - Young Alumni to Solicit via	Emailable, Solicitable graduates 20 years out, filterable by Regi	Constituent
Alumni Relations - All DSA Recipients	DSA Recipients - regardless of solicit codes (Distinguished Serv	Constituent
Central Donor Relations - Dollars Raised by Department	Displays gifts given to the specific Designation/Department wi	Revenue
Corporate & Foundation Relations - Gifts by College/Departm	Displays gifts filtered on College/Department/Special Projects	Revenue
Alumni Relations - College of Agriculture, Forestry and Life Sci	CAFLS Enewsletter distribution list, excludes do not email, sear	Constituent
Alumni Relations - Alumni by Major or College	All graduates (regardless of solicit code), filterable by college,	Constituent

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

CADENCE	Constituents - Name or lookup ID	م	O Add new •
Home - Constituents - Market	ing and Communications 👻 Revenue 👻 Events 👻	Memberships 👻 Pros	pects 🔻 Fundraising 👻 Treasury 👻 Web 👻 Analysis 👻 Administration 👻
Tasks	Information library Smart query: Alumni Rel	ations - All D	OSA Recipients
M Add to favorites	Name: Alumni Relations - All DSA Recipient	s Owner:	S26\79525pAdmin
S View exports	Type: Constituent	Source:	Alumni Relations - All DSA Recipients
📁 Assign permissions	Category:	Description:	DSA Recipients - regardless of solicit codes (Distinguished Service Award)
Shortcuts		Others can modify:	Yes
🕱 Add this page to shortcuts			
🔕 Manage my shortcuts			
👳 Shell Design	Results Click here to process the query and view the results	esults	
Recent searches			
🔊 Smart query search			

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.

CADENCE	Constituents   Name or lookup ID
Tasks        ✓ Edit definition       Ⅲ Add to favorites	And Communications V Revenue V events V Memoersings Prospects V Fundratising V Freesury V Web V Analysis V Information library Smart query: Alumni Relations - All DSA Recipients Name: Alumni Relations - All DSA Recipients Owner: S26/19525pAdmin
View exports	Type: Edit Smart Query - Alumni Relations - All DSA Recipients
Shortcuts  Add this page to shortcuts Manage my shortcuts Shortcuts Shortcuts	Categor Parameters Pesults Set save options Year Awarder: 2014 Click
Recent searches	
Recently accessed	
<ul> <li>Information Library</li> <li>Smart query: Central Donor Relations - First Gifts</li> </ul>	
👼 Shell Design	
Smart query: Annual Giving - First Gifts	
Smart query: Donor Relations - Alum Giving	
Smart query: Central Donor Relations - Dollars Raised by Department	Browse Export to CSV Export to Excel Add to shortcuts  Help Cancel
🔊 Smart query: Volunteer	

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

To export **all the results** to a .cvs 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.

CADENCE	Constitue	ents 🔻 Name or looku	p ID	ρ	🕽 Add new 🔻		
Home 👻 Constituents 👻 Marketi	ing and Comm	nunications - Reve	enue 👻 Events 👻 Memb	erships 👻 Prospec	ts 🝷 Fundraising	▪ Treasury ▪ Web	▼ Analysis ▼ A
Tasks ×		mation library art query: A	Alumni Relatio	ns - All DS	A Recipien	its	
Add to favorites	Name:	Alumni Relations	- All DSA Recipients Own	ier: S2	26\79525pAdmin		
S View exports	Type: Categor	Edit Smart Quei	y - Alumni Relations	- All DSA Reci	pients	_	
Shortcuts		Parameters	esults Set save option				
Add this page to shortcuts		Results (4 recor					<i>P</i> ::
🔅 Manage my shortcuts		Lookup ID	Name	Year Awarded	Name	Address Line 1	Address Line
🔊 Shell Design	Results	T31217	Daniel C. Stanzione	2014	Dan	6781 Southeast	Address Lin
	Click	T70605	Steve C. Griffith	2014	Steve	188 Hayes Road	
Recent searches 🔅		T80818	Thomas C. Alexander	2014	Thomas	150 Cleveland	
Smart query search		T53660	Charles E. Dalton	2014	Charles	11 Harvest Court	
A Purpose search							
🙏 Designation search							
😽 Committee search							
Crganization search							
Recently accessed 🛛 🖄							
Smart query: Alumni Relations - All DSA Recipients							
🔟 Information Library							
Smart query: Central Donor Relations - First Gifts							
🔊 Shell Design							
Smart query: Annual Giving - First Gifts							
Smart query: Donor Relations - Alum Giving			ixport to CSV				Þ
Smart query: Central Donor Relations - Dollars Raised by Department		Help	xport to CSV 🖄 Export	Add t	o snortcuts	Save	Cancel
🔊 Smart query: Volunteer	_						

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.

Name:	Prospect Research – Research List Criteria	Owner:	S26\vbennae79525p		OData:	Get OData link
Туре:	Constituent	Source:	Prospect Research – Research	n List Criteria		
Category		Description:	Restrictions: Constituents and prospect manager. Constitue Mandatory" and "No solicitat County, State, and TY IPTAY L	nts without "Do not contact e ion" solicit codes. Filterable o	kcept	
		Others can modify:	Yes			
Populte	(Over 500 records	found Only t	he first 500 rows are shown			
			he first 500 rows are showr	ı.)	Browse	
	(Over 500 records		he first 500 rows are showr	ı.)	Download	to CSV
14 4			he first 500 rows are showr Primary County	n.) Primary State		to CSV
14 4   L	Page 1 of 10 ookup ID	► M			Download	to CSV
l4 4 L 8-10158	Page 1 of 10 ookup ID 234 Mi	Name			Download	to CSV
14 4 L 8-10158 8-10927	Page 1 of 10 ookup ID 234 Mi 726 An	Name			Download	to CSV
14 4	Page         1 of 10           ookup ID         0           234         Mi           726         An           727         Ch	Name Name litary ma Mariella	Primary County	Primary State	Download	to CSV
L 8-10158 8-10927 8-10927	Page         1         of         10           ookup ID         0         <	Name Name Ilitary Ina Mariella Iris T. X121	Primary County	Primary State	Download	to CSV

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.

Parameters esults (4 reco	Results Set save option	15			<i>»</i> 3	
Lookup ID	Name	Year Awarded	Name	Address Line 1	Address Line	
31217	Daniel C. Stanzione	2014	Dan	6781 Southeast		
70605	Steve C. Griffith	2014	Steve	188 Hayes Road		
80818	Thomas C. Alexander	2014	Thomas	150 Cleveland		
53660	Charles E. Dalton	2014 Choo	se page defii	nition		
		O	pen the selected	record with:		
			Page Definiti	on		
			Affiliated Edu	cation History Page		<u>^</u>
			Alumni Listir	ig		
			Committee F	undraising and Giving	g Report Page	E
			Committee M	Aember Page		
			Committee F	age		
			Communica	tion Preferences		
			Constituent	Correspondence Page		
			Constituent	Documentation Page		
			Constituent	Employment History F	age	
			Constituent	Funds Received Page		
			Constituent	Group Memberships P	age	
Browse	Export to CSV 🛛 Export	tto Evcol	Constituent		-	
o lowse	Exportin Cov Calexport	LIU LACEI U		nteractions Page		
Help			Constituent			
, and			Constituent			
				Recognition Default P	age	
						<b>T</b>

asks 🔅	👌 Dr. Da	niel C. Stanzic	one , Ph.D. 1967						
Add pledge	Individual	Lookup ID: T312	217						
Add recurring gift	Constituencies:	Alumnus Alumnus Par	ent Donor at some time Planned Giver Trib	utee Tribute Donor Event registrar	nt Fundraiser Pros	pect			
Add membership	Personal Inform	nation	Contact Information	Addresses Q / (1 of 7)	4 b Prim	ary Relationships	Documentation a	nd Interactions	
Add Dr. Daniel C. Stanzione Ph.D. 1967 to a		Dr. Daniel	Primary phone	6781 Southeast Harbor Circle		use	Notes: 18	O Note	
group or household		Charles	+1 (772) 225-6497 (Personal)	Stuart, FL 34996-1964		Lisa Votta	Media links: 0	O Media link	
Edit lookup ID		Stanzione, Ph.D.	Primary email 🥖	Home (Current)		isehold iel Stanzione and Lisa Votta	Attachments: 26	Q Attachment	
Edit link to user		Nickname: Dan Maiden:	dstanzione@gmail.com (E-mail)			ner stanzione and Lisa votta nary business	Interactions: 246	O Interaction	
Remove spouse						Laboratories	Interactions: 246	O Interaction	
Write letter from template	Memberships	0							
Write a letter	ID:	Status:							
Delete Dr. Daniel C.	Expiration:								
	Level:								
	Member since:								
Data processing request BBIS duplicate registration	Member since:								@ Cur
Data processing request BBIS duplicate registration w as									🕲 Cur
Data processing request BBIS duplicate registration w as * Fundraiser	Member since:								🏐 Cu
Data processing request BBIS duplicate registration w as * Fundraiser e information *	Member since: Show less		Relationships Revenue Online Info	Memberships Prospect Educ	ation Document	tation and Interactions Cor	mmunications History 4	Attributes Events S	
Data processing request BBIS duplicate registration w as * Fundraiser re information * Wealth and ratings	Member since: Show less		Relationships Revenue Online Info	Memberships Prospect Educ		tation and Interactions. Cor	mmunications History 4	Attributes Events S	Cur Smart Fields PaperSave
Data processing request BBIS duplicate registration w as * Fundraiser re information * Wealth and ratings	Member since: Show less		Relationships Revenue Online Info	Memberships Prospect Educ	Rece		mmunications History #		
Data processing request BBIS duplicate registration w as * Fundraiser e information * Wealth and ratings Web dashboard pages	Member since: Show less		Relationships Revenue Online Info	Memberships Prospect Educ	Rece 12/1	nt revenue 17/2019 Donation	\$500.0	20	
Data processing request BBIS duplicate registration w as Fundraiser re information Wealth and ratings Web dishboard pages corts	Member since: The Show less		Relationships Revenue Online Info	Memberships Prospect Educ	Rece 12/1	ent revenue		20	
Data processing request BBIS duplicate registration w as Fundraiser re information Wealth and ratings Web deshboard pages norts excesse query results (4 reco	Member since Show less Summary Corr ords found)	ntact Personal Info		Memberships Prospect Educ	Rece 12/1	nt revenue 17/2019 Donation	\$500.0	20	Smart Fields PaperSave
Data processing request BBIS duplicate registration r as iundraiser e information web dashboard pages orts course query results (4 rec prosus record N N et rec	Member since Show less Summary Corr ords found)	ntact Personal Info			Rece 12/1	Int revenue 17/2019 Donation 17/2018 Donation	\$500.0	20 20	Smart Fields PaperSave
Data processing request DBES duplicate registration vas  indicates registration would have been applied wealth and ratings Web deshboard pages come query results (4 most comes query results (4 most process record  Net rec ppli0 1	Member since	ntact Personal Info	Name A		Rece 12/1 12/7	nt revenue 17/2019 Donation	\$500.0 \$500.0	20	Smart Fields PaperSave
Data processing request BBS duplicate registration w as a fundration re information to a web dashboard pages web dashboard pages extrs @ scoose guerry result (4 or creations) scoose guerry result (4 or creations) app 10 11 12 12 12 12 12 12 12 12 12 12 12 12	Member since * Show less Summary Corr ords (sound) ord View records with: Name	ntact Personal Info Constituent Page Year Awarded	v Name A Dan 6	ddress Line 1 Addre	Rece 12/1 12/7	nt revenue 17/2019 Donation 17/2018 Donation	5500.0 5500.0 State	20 20 Zip	Smart Fields PaperSave Email Addresser/ distanzione@gm
Data processing request BBS duplicate registration w as Fundations Would hand ratings With deshband pages ports	Member since	ntact Personal Info Constituent Page Year Awarded 2014	Name A Dan 6 Steve 1	ddress Line 1 Addre 81 Southeast Harbor Circle	Rece 12/1 12/7	nt revenue 17/2019 Donation //2018 Donation City Stuart	S500.0 S500.0 State Filorida	20 21p 34996-1964	

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