

# 2017 DDI User Group

Building Community Together...

## Query Tool



# Agenda



- Overview
- Simple Queries
- Complex Queries
- Demo
- Reminders



# Overview



- Data Sources
- Build a new query
- Single Table
- Multiple Tables



# Query Tool Data Sources



## Main Data Sources

**Select a data source to add to the query:**

- Name/Address
- Investment & Loan System
- FundRaiser
- FundWriter

# Query Tool Data Sources



## Name/Address

- ☞ Name/Address
  - .....Constituents
  - .....Master Accounts
  - .....Contact information
  - .....Memos
  - .....Projects
  - .....Alternate ID
  - .....Contact history
  - .....Bulk mail
  - .....Committees
  - .....Committee officer mail
  - .....Countries
  - .....States
  - .....Regions
  - .....Areas
  - .....Cities
  - .....Postal codes
  - .....Counties
  - .....Account Information Codes

## Investment & Loan

- ☞ Investment & Loan System
  - .....Loans
  - .....Correspondents
  - .....Loan types
  - .....Transactions
  - .....Loan fee types
  - .....Loan payment requests
  - .....Loan tickler records
  - .....Loan guarantees
  - .....Cash receipt batches
  - .....Cash receipts
  - .....Investments
  - .....Investment categories
  - .....Investment types
  - .....Investment state sales
  - .....Investment state sales by type
  - .....Investment state sales by type/year
  - .....Portfolios
  - .....Portfolio types
  - .....Lines of credit

## FundRaiser

- ☞ FundRaiser
  - .....Donor accounts
  - .....Donor transactions
  - .....Gifts
  - .....Miscellaneous revenue
  - .....Recurring gifts
  - .....Gift detail
  - .....Pledges
  - .....Pledge programs
  - .....Planned gifts
  - .....Named funds
  - .....Campaigns
  - .....Appeals
  - .....Campaign groups
  - .....Events
  - .....Event receipts
  - .....Programs
  - .....Local allocations

## FundWriter(GL)

- ☞ FundWriter
  - .....General ledger transactions
  - .....Subsystem G/L transactions

# Build a New Query



1. Name the query
2. Select query type
3. Select criteria
4. Select columns to output
5. Select the sort order (optional)
6. View/Export your new query





**Demo**

# Single Table



Query Editor

## Data Sources

Query name:   Allow all users to run this query

Category:

**Query Data Sources**

**Select a data source to add to the query:**

- Name/Address
  - ..... Constituents
  - ..... Master Accounts
  - ..... Contact information
  - ..... Memos
  - ..... All relationships
  - ..... Projects
  - ..... Alternate ID
  - ..... Contact history
  - ..... Bulk mail
  - ..... Committees
  - ..... Committee officer mail
  - ..... Countries
  - ..... States
  - ..... Regions
  - ..... Communities
  - ..... Cities
  - ..... Postal codes
  - ..... Counties
  - ..... Account Information Codes
- Investment & Loan System

Next



# Single Table



Query Editor

## Select Query Type

Name/Address: Constituents

Query type:

- All rows
- Distinct rows
- First row
- Summary row
- Grouped rows

Query Editor

## Selection Criteria

Name/Address: Constituents

\* Add Edit Edit Value Delete Move Line: ▲ ▼

	Column	Condition	Value
1	Deletion code	EMPTY	

Deletion code

AND OR

Previous Next

# Single Table



Query Editor

## Select Columns to Output

Name/Address: Constituents

Available Output Columns

- Birth month
- Birth year
- Birth date
- Age
- Earnings code
- Earnings description
- Education code
- Education description
- Employer
- Position
- Profession code
- Profession description
- Emp start dt
- Emp end dt
- Is employee
- Marital status code
- Marital status description
- Clergy type code
- Clergy type description
- Clergy status code
- Clergy status description
- Prospect date
- Marriage date
- Divorce date
- Deceased date
- Ordination date
- Ordination place
- Church membership
- Year established
- Church opt out email
- Org. business

Add >

< Remove

Selected Output Columns

	Column	Function
1	PIN	
2	Acct type	
3	Name/Address block	
4	Salutation	
5	Preferred email	
6	Home email	
7	Work email	
8	Preferred phone	
9	Home phone	
10	Work phone	

Previous

Next

# Single Table



Query / Reporting

New Edit Delete View Export Exit

Description	Owner	Category
Investment Listing	pmchugh	
Single Table Query		

Query Results Viewer: Single Table Query

File Edit Query Save Query Refresh

Drag a column here to group by this column.

PIN	Acct type	Name/Address block	Salutation	Preferred email	Home
<a href="#">1</a>	O	DiscipleData, Inc. 101 W Ohio St Indianapolis, IN 46204-1906	Dear Friends:		
<a href="#">62</a>	I	Patrick McHugh 16367 Anderson Way Noblesville, IN 46062	Dear Patrick McHugh and Br	mail.com	ptmchugh2001
<a href="#">63</a>	I	Brandy McHugh 16367 Anderson Way Noblesville, IN 46062	Dear Brandy McHugh and Pa	il.com	bmchugh9981
<a href="#">64</a>	I	Ella McHugh 16367 Anderson Way Noblesville, IN 46062	Dear Ella McHugh:		
<a href="#">65</a>	I	Emerson McHugh 16367 Anderson Way Noblesville, IN 46062	Dear Emerson McHugh:		
<a href="#">66</a>	I	Everly McHugh 16367 Anderson Way Noblesville, IN 46062	Dear Everly McHugh:		
<a href="#">67</a>	I	Rachel Ambler 708 Boulder Way	Dear Rachel Ambler:		

Sort Ascending  
Sort Descending  
Clear Sorting  
Conditional Formatting  
Group by this column  
Column Chooser  
Hide Column  
Pinned state  
Best Fit  
Save Layout  
Reset Layout

Count: 236



# Multiple Tables



Query Editor

**Data Sources**

Query name:   Allow all users to run this query

Category:

**Query Data Sources**

- Investments
  - Investor master account
  - Master account
  - Primary constituent (Tax ID)

**Select a data source to add to the query:**

- Name/Address
- Investment & Loan System

# Multiple Tables



Incorrect

Query Editor

**Data Sources**

Query name: Complex - Incorrect

Category: (None)

**Query Data Sources** Edit Remove

- Constituents
- Master Accounts
- Investor master account
- Investments



Query Results Viewer: Complex - Incorrect

File Edit Query Save Query Refresh

Drag a column here to group by this column.

	PIN	Name/Address block						
	<a href="#">96</a>	Bill Smith 152 Indiana Dr Noblesville, IN 46062						
		<table border="1"><thead><tr><th>Account ID</th><th>Investment number</th><th>Current principal balance</th></tr></thead><tbody><tr><td><a href="#">000010049</a></td><td>100043</td><td>5,000.00</td></tr></tbody></table>	Account ID	Investment number	Current principal balance	<a href="#">000010049</a>	100043	5,000.00
Account ID	Investment number	Current principal balance						
<a href="#">000010049</a>	100043	5,000.00						
+	<a href="#">10668</a>	Blue Meadow Church of God 600 N Ford Rd Merrillville, IN 46410-1464						
		<table border="1"><thead><tr><th>Account ID</th><th>Investment number</th><th>Current principal balance</th></tr></thead><tbody><tr><td><a href="#">000010048</a></td><td>100042</td><td>5,000.00</td></tr></tbody></table>	Account ID	Investment number	Current principal balance	<a href="#">000010048</a>	100042	5,000.00
Account ID	Investment number	Current principal balance						
<a href="#">000010048</a>	100042	5,000.00						

# Multiple Tables



Correct



Query Editor

**Data Sources**

Query name:

Category:

**Query Data Sources**

- Investments
  - Investor master account
  - Master account
  - Primary constituent (Tax ID)

Query Results Viewer: Complex

File Edit Query Save Query Refresh

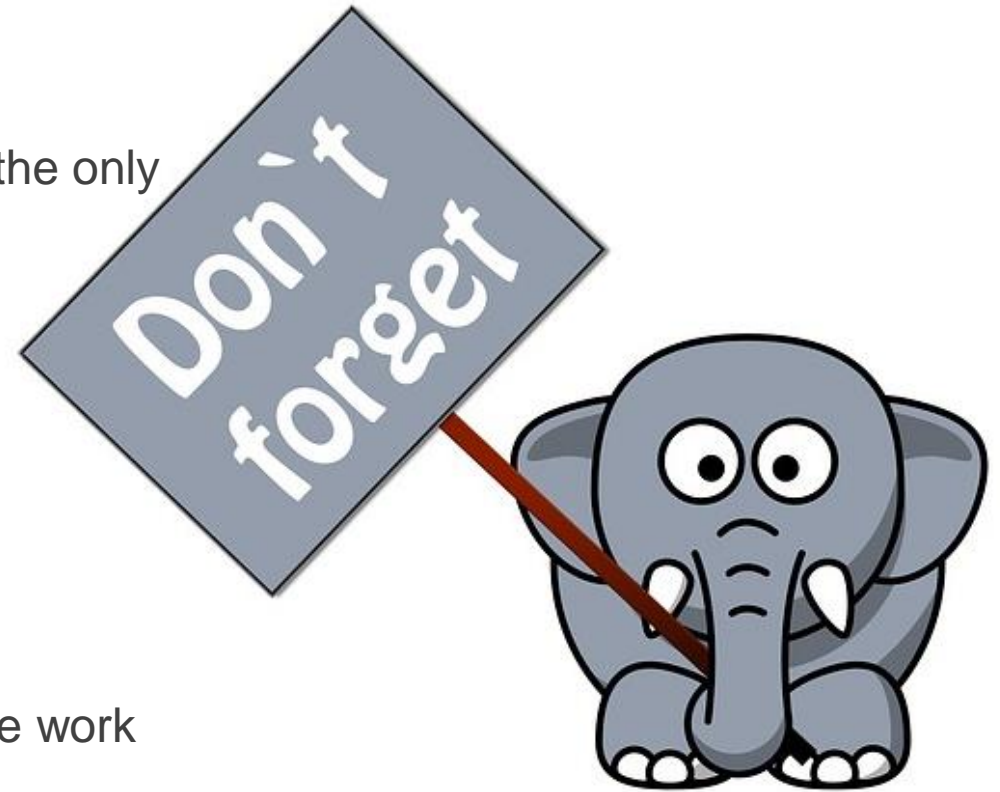
Drag a column here to group by this column.

	Account ID	Investment number	Current principal balance	PIN	Name/Address block
+	<a href="#">000010048</a>	100042	5,000.00	<a href="#">10668</a>	Blue Meadow Church of God 600 N Ford Rd Merrillville, IN 46410-1464
	<a href="#">000010049</a>	100043	5,000.00	<a href="#">96</a>	Bill Smith 152 Indiana Dr Noblesville, IN 46062

# Reminders



- Data in the Query Tool is real time. Transaction activity is the only historical data
- Queries are not schedulable like in the Information Query
- When DDI creates queries for your organization it is billable work



# Webinars and Touchbases



## Webinars:

- Monthly hour long sessions
- Open Q&A time at the end of the session
- Link to the webinar for future viewing
- PDF setup and checklist guide
- Cost per organization: \$75/month

## Touchbases:

- Free hour long sessions
- Monthly, Bi-Monthly, or Quarterly
- Discuss open or new requests, software needs, etc.
- Use allotted time for training on DDI-Connect™





# Discussion, Questions, Comments



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