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BACKGROUND INFORMATION

This ASK System is intended for use by employees who need to successfully create queries in the CRM database.

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LEARNING OUTCOMES & TYPES OF QUESTIONS

Learning Outcomes

- Given a scenario and screenshot example of a previously built query, the learner will be able to determine why a query is not pulling the results desired with 100% accuracy and note the reasons on the screenshot.
- Given a screenshot example of the filter/output tab the learner will list all four components of building a query from within that tab (query tree main, query tree middle, filter, output). Then they will be able to accurately explain the general purpose of all four functional areas verbally to the instructor in 2 minutes or less and 100% accuracy.

Types of Questions

- Problem Solving/Meta-cognitive
- Knowledge Acquisition

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DUPLICATES EXAMPLE

- ▶ The below query is not providing the desired results. Our team members must determine the cause of the duplicates and understand the troubleshooting concepts involved in query building so they can receive the desired results.

Why would a query produce duplicate lines for a constituent?

If the filter criteria is changed to include only constituents with an interest in education, will this solve the duplicates record problem?

What else could be causing the error?

Click Here

The screenshot shows a window titled "New Ad-hoc Query - Blackbaud CRM Ad-hoc query". The interface includes a menu bar (File, Edit, View, Favorites), a toolbar, and a main workspace. The "Output/Filters" tab is active, showing a filter: "Interests\Interest type is not blank". The "Field Explorer" on the left lists various data sources, with "Interests" selected. The "Interests" pane shows fields like "Comments" and "Interest type". The "System Fields" pane lists fields like "Added by application" and "Date added". The "Output Fields" pane shows "Name" and "Interests\Interest type". The status bar at the bottom indicates "Ready" and "199 rows".

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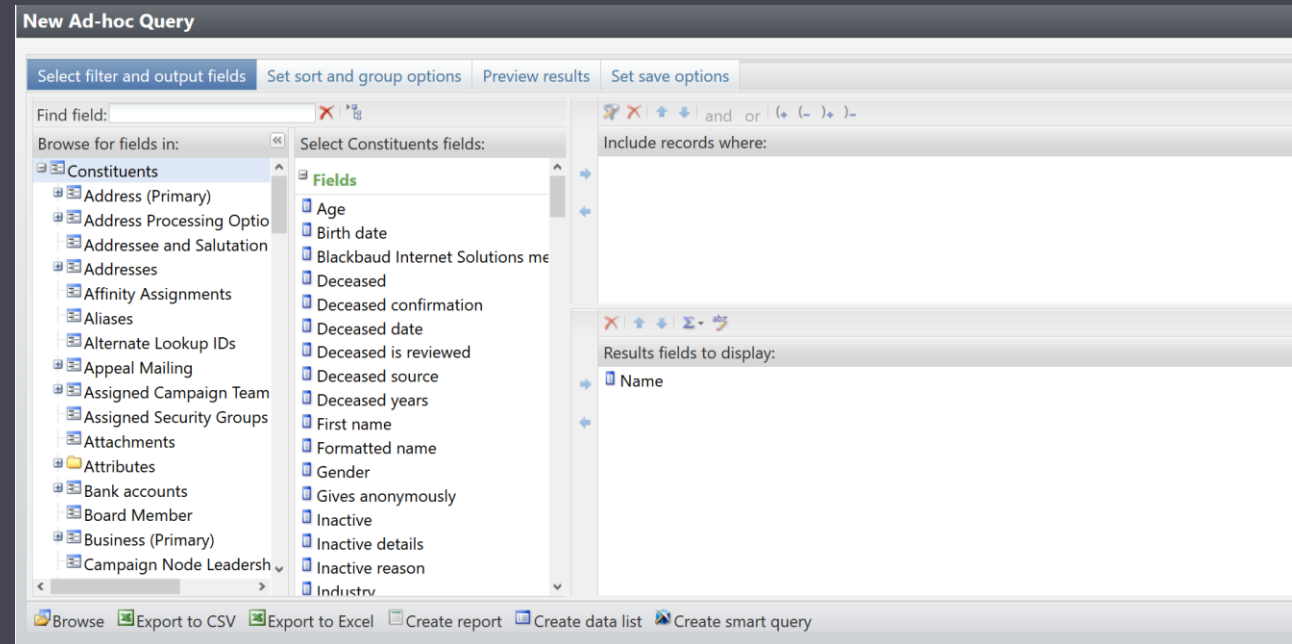
What are the various
criteria filters?

- ▶ There are many components of a query. Without understanding their purpose and functionality building a query will be impossible. Click on the questions on the left to learn more about a query.

What is the purpose
of the Filter in a
Query?

DIRECTIONS: Click the question on the left to learn more.

What is a source view
type?



What is the query
tree and how can it
be used?

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CHANGE THE FILTER TO ONE TYPE OF INTEREST

In the previous example we receive the following duplicate constituent results:

Polo Marco	Government & Politics
Polo Marco	Volunteering
Prince Charming (Trainer'...	Campaigning
Prince Charming (Trainer'...	Education
Prince Charming (Trainer'...	Health and Wellness
Prince Charming (Trainer'...	Interfaith Relations
Prince Charming (Trainer'...	Social & Community Service

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After changing the filter to education, we see the duplicates no longer exist.

Name	Interests\Interest type
Jane 410 Smith 1436	Education
Prince Charming (Trainer'...	Education

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But how can I
produce a list of all
interests without
receiving duplicate
constituent lines?

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WHAT CAUSES DUPLICATES?

Explanation: When the interest filter was blank the system provides all constituents and lists all interests. If the constituent has more than one interest, the system places each interest in its own line. The constituents are duplicated but the interest is not.

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But how can I
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WHAT ELSE COULD BE CAUSING THE ERROR?

Be sure to check your filters, remove and add/change to see how results are changed with each filter. Do you have multiple outputs which are causing your data to be doubled? Did you select the correct field in the query tree?

Be sure to check the userguides located in [Basecamp](#) or contact the CRM Team for further assistance.

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USE AN EXPORT DEFINITION

An export definition can create columns to produce multiple data fields for one line. Listing all interests on a constituent record would be accomplished by creating an export definition and merging it with a query.

Name	Interest 1	Interest 2	Interest 3	Interest 4		
Marco Polo	Government and Poli	Volunteering				
Prince Charming	Campaigning	Eductation	Health and Wellness	Interfaith Relations	Social & Community Service	
Jane 410 Smith 1436	Education					

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WHAT ARE THE VARIOUS CRITERIA OPERATORS?

Query Criteria	Query Criteria	Example/Guidelines
Equal to	Not equal to	(Exact value defined)
One of	Not one of	(Record must have one of your criteria)
Less Than	Greater than	(Value less than you enter, blanks included in less than grouping)
Less than or equal to	Greater than or equal to	(Includes greater than and the value you entered)
Between	Not between	(Record falls between a range)
Like	Not like	(Can use the “_” and “%” wildcard characters)
Begins with	Does not begin with	(Includes entries that begin with your criteria)
Blank	Not Blank	(No entry or blank in the data field)
Contains	Does Not Contain	(Records without defined value– similar to one of)
Under	Not Under	(hierarchical --- all records that are children of the selected parent field)
Sounds Like		(Similar to Fuzzy Search)

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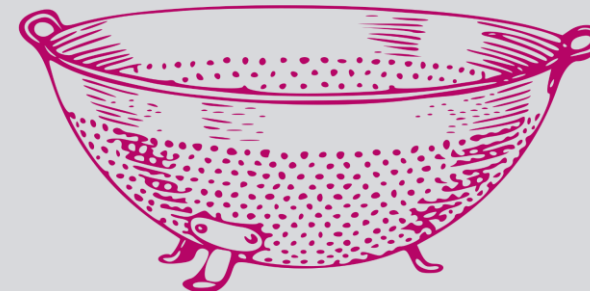
To learn more about filters view the [Query Criteria Operators Video](#).

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WHAT IS THE FILTERS PURPOSE?

The filter allows certain information requested in the query to be included in the results and other data is not included.

Its like a strainer used after cooking pasta. We place the pasta and the water in the strainer. The strainer keeps the pasta, but lets the liquid pass through.



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WHAT IS THE SOURCE VIEW TYPE?

The source view type allows the query user to determine what kind of data is the main focus of the query. Determining the source view type is the first decision in query building and effects all other components there after. As such this is a very critical step. The most common examples of source view types include:

Constituents	Provides the ability to query all constituent fields.
Revenue	Revenue
Campaigns (Custom)	View custom campaigns. - Spec found in the BBCRM
Events	Query view used for event information.

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Please visit the [query user guides](#) for more information.

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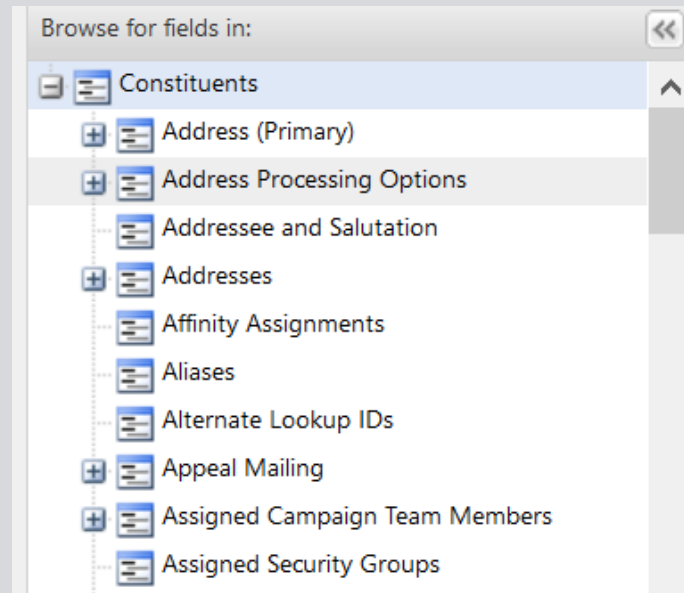
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WHAT IS THE FILTER TREE AND HOW IS IT USED?

The filter tree helps a query builder select the exact field required in either the filter or output. The query tree is very complex and branches down to include every single field in the database. Please reference the [Query user guide](#) for more information.



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