IQ Queries

Instructions.

Home Census Diocesan Development 10 Administration Query Builder Intelligent Query Intelligent Query Save Query My Queries Recur Query Tags Model Properties 1. Use My Queries to find the query you want to use Viewing Query DDF Listing Donations Result Columns Query Probettet 2. Query Conditions is used to limit the results Column Picker Result Columns Expression Title Save Query Save Query Probettet Commant Expression Expression Expression Title Save Query Probability Save Query Probability Batches Expression Expression Expression Save Query Probability	ParishSOFT Diocesa	HELP - CONTACT - Diocese of San Bernar	HOME - SIGN OUT dino, San Bernardino ekuske (Eric Kuske)	
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Check Number Comment	Column Picker F Batches Contributions Batch DUID	Expression Title Families Family DUID Family DUID Families Envelope Number Envelope Number		2. Query Conditions is used to limit the results
and Contributions Payment Date is between Jan 01 2006 and [enter value] Matching Gift Company ID Owner Organization ID (Add new condition] (Add new condition] (Add new condition] (Add new condition] (Add new condition] (Add new condition]	Check Number Comment Contrib DUID Family DUID Fund DUID Fund DUID Fund Description is Down Payment	Eamlies Last Name LastName Families Mailing Name Mailing Name Families.Contact Info Primary Address 1 Address 1 Add new column Address 1 Query Conditions elect records where all on the following apply Organization Organization ID is equal to 22330	+ (+)	3. Indicates that condition is enabled clicking on it will disable it.
	is Electronic Payment Matching Gift Company Matching Gift Company ID Owner Organization ID Curpcy Regults a 0	and Contributions Payment Date is between Jan 01 2006 and [enter value] and Contributions Fund Description is equal to [enter value] Add new condition]		4. Indicates that condition is disabled clicking on it will disable it.

Use My Queries (number 1 above) to search for the query you are interested in using. On page 2 from the below list. When opening the query, you will be able to adjust the conditions of the query to meet your needs under Query Conditions (number 2 above). You can enable or disable conditions as shown in numbers 3 and 4 above.

When using "My Queries" The following screen comes up:

viy Quei	163					
Query Tags:	V Query Name:		Query Owner:		Apply Clear	
	Query Name	Query Tags	Date Created	Date Modified	Owner	Globa
Edit Delete	Dio DDF Listing Donations	Custom Queries	7/24/2019	7/24/2019	Kuske, Eric	>
Edit Delete	Dio SA Confirmation		6/26/2020	6/29/2020	Kuske, Eric	4
Edit Delete	Dio SA Reconciliation		6/29/2020	6/29/2020	Kuske, Eric	~

Use the box "Query name" to type in the name of the query or part of the name, then click on apply to limit the list.

At the bottom of that window it will show pages which you can click on to see what queries are on each page.

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List of Queries Created for Parish Use:

Dio DDF Listing Donations:

This is used by the parish office's that post the entries directly to one of their funds to list the entries made for DDF, FCC or SCC so that the Development Office has a listing of the entries. Use the conditions to adjust what the date range is and what fund to limited it to.

Dio SA Confirmation

Lists the confirmations for the parish between a certain date range that are marked completed. *Make sure to check of the box for Unique Records Only.*

Includes the birthdate so that after data is exported to csv file a calculation can be done to determine age of person at the time of confirmation.

Dio SA Reconciliation

Lists the Reconciliations that are completed for the parish between a certain date range. <u>Make</u> <u>sure to check of the box for Unique Records Only</u>. Be sure to set the Parish ID to your parish ID and the date range to what is being looked for.

Dio SA Catechumens/Candidates

Lists the Baptism, First Eucharist, Confirmation and RCIA fields so that the number of Catechumens and candidates can be found. <u>Make sure to check of the box for Unique Records</u> <u>Only</u>. Be sure to set the Parish ID for Eucharist and Confirmation to your parish ID and the date range to what is being looked for.

Dio SA Death Count

List the number of records where the Date of Death is between the indicated date range, and the Death record indicates the parish represented by the Parish ID. <u>Make sure to check of the box for</u> <u>Unique Records Only.</u>

Dio BYTE Mailing List

Lists all the families that gave to one of the tax-deductible funds between the indicated date range.

Use the conditions to adjust the date range. More conditions can be added if needed.

Dio Env Check

Allows for listing of families that are set to received envelopes based on the "send contribution envelopes" check box. By using the various conditions families can be found that haven't given to a fund by a date range or have given to that fund in a date range.

To list families that have given to a fund during a date range the following parameters would need to be set or made active using 3 or 4 in the above instructions:

Families Send Contribution Envelopes is equal to Yes
and Families Family DUID in sub query [edit sub-query]
a. In the edit sub-query
Select records where all of the following apply
Contributions Payment Date is greater than or equal to Jan 01 2021

and Contributions Fund ID is equal to 10582
i.
ii. Change to what is needed for the date range and fund ID. If a parameter is not needed it can be removed or the circle unmarked as in 3 or 4 in the above instructions.

To list families that have not given to a fund during a date range the following parameters would need to be set or made active using 3 or 4 in the above instructions:



Dio sum Tax deductible

Will list all the families that gave to one of the funds marked as tax deductible for the given date range. However, you will need to use excel to limit the list to those that gave a total amount in the ranges needed. So for instance if you wanted to break the list up as follows:

- Those that gave less than \$100
- Those that gave \$100 or more and less than \$1000
- Those that gave \$1000 or more

You would need to filter the "sum of Contributions Payment Amount" by those conditions.