

Creating and Subscribing to a Query in Reeher

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1. In Reeher, go to Targeter (in the top-right corner), and click on **New Query**.
2. Next, expand the listed filters where it says **Donor Attributes** and check the box for **School/Unit Designation**.
3. Now scroll through the list in the filter and select the appropriate unit (School of Education in picture below) so it is highlighted.
4. Select the time period you are wanting to look within (Current Month in picture below), and then click **Get Results**.

The screenshot displays the 'Add a Query' interface. On the left, the 'Filters' sidebar is visible, with 'Donor Attributes' expanded and 'School/Unit Giving Designation' checked. The main content area shows the 'School/Unit Giving Designation' filter with a dropdown menu open, listing various units, with 'School of Education' selected. Below this, the 'Select Transaction Date Period' dropdown is set to 'Current Month'. A large teal button labeled 'GET RESULTS' is positioned at the bottom right of the interface.

- On the results page click on **Columns** to bring up the available columns of data to include in the result set.

35 records found.

export columns view: [Menu] [Table] [Refresh]

Entity ID	First Name	Last Name	Home Zip Code	Home State	Primary Relationship type	Last School/Unit Designations	Last Transaction Amount	Last Transaction Date	Last Transaction Type
000001376	Susan	Davis	95608						Gift
000005034	J. Rodney	Davis	95608						Gift
000006175	Eldon	Englebrecht	95536						Gift
000013382	William	Mahon	87048						Pledge Payment
000019647	Floyd	Shimomura	95695						Gift
000022311	Jane	Mahon	87048						Pledge Payment
000026353	Victor	Lim			Friend	School of Education	\$200	02/18/2015	Gift

ADD COLUMNS

- AF Commitments - Current FY
- AF Commitments - Previous FY
- Cash Giving - Current FY
- Cash Giving - Previous FY
- Commitments - Current FY
- Commitments - Previous FY
- Cumulative Annual Fund Cash Giving
- Cumulative Annual Fund Commitments
- Cumulative Cash Giving
- Cumulative Commitments
- Donor Status
- Last Designation
- Last Designation Allocation Department
- Last Designation Purpose
- Last School/Unit Designations
- Last Transaction Amount
- Last Transaction Appeal
- Last Transaction Date
- Last Transaction Type
- Number of Fiscal Years Giving
- Reeher Predictive Scores
- Consumer Variables
- University of California - Davis Specific

Submit Cancel

NOTE: You will find the transaction columns under **Donor Attributes** section shown on the left (just like the filters were labeled).

- Once you are happy with your selections and the results you are getting we can save the query.
- To save the query, click the **Save** button to the top-right of the results and fill in the **Name** and **Description** fields.

35 records found.

export columns view: [Menu] [Table] [Refresh]

Entity ID	First Name	Last Name	Home Zip Code	Home State	Primary Relationship type	Last School/Unit Designations	Last Transaction Amount	Last Transaction Date	Last Transaction Type
000001376	Susan	Davis	95608						Gift
000005034	J. Rodney	Davis	95608						Gift
000006175	Eldon	Englebrecht	95536						Gift
0000013382	William	Mahon	87048						Pledge Payment
000019647	Floyd	Shimomura	95695						Gift
000022311	Jane	Mahon	87048						Pledge Payment
000026353	Victor	Lim			Friend	School of Education	\$200	02/18/2015	Gift

Save

Query Name: [Text Field]

Description: [Text Field]

Viewable By: Public Private

Ok Cancel

- Once saved, click where it says **Queries** on the top-left of the page to return to the Targeter screen where the queries are listed.
- Find your new query and click the green '+' button to bring up the subscription details.

The screenshot shows the UC Davis Targeter interface. At the top, there are navigation tabs for 'ADVANCEMENT', 'MAJOR GIVING', and 'TARGETER'. Below this is a search bar and a 'NEW QUERY' button. The main area is titled 'ALL QUERIES' and contains a table of queries. A sidebar on the left shows navigation options like 'ALL QUERIES (52)', 'MY QUERIES (0)', 'MY SUBSCRIBED QUERIES (0)', 'FAVORITES (0)', and 'REEHER TEMPLATES (7)'. The table has columns for 'Name', 'Last Used', and 'Subscription Settings'. One query is highlighted with a red box around its 'Subscribe' button, which is also pointed to by a red arrow.

Name	Last Used	Subscription Settings
Your Saved Query (example) Active Status, School of Law grads from last 10 years, 100-mile radius of Davis, CA (956160)	N/A	Subscribe (0) Subscriber(s)
SF \$500	N/A	Subscribe (0) Subscriber(s)
\$500-\$999.99 Donors who gave \$500-\$999 through ASGP appeals last week	N/A	Subscribe (4) Subscriber(s)
Identify Planned Giving Prospects	N/A	Subscribe

- Finally, select the options you would like for the subscription and click **Submit**.

The screenshot shows a dialog box titled 'Your Saved Query (example)'. It contains a section for email preferences. A red box highlights the text 'You will get emails regarding new results:' and a dropdown menu with options: 'Daily', 'Daily', 'Every Weekday', 'Weekly', and 'Monthly'. Below this is a radio button question 'Receive emails for zero results?' with 'Yes' and 'No' options. At the bottom are 'Submit' and 'Cancel' buttons.

You are now subscribed to the new query you created!