Supporter Donation System Quick Tips
Supporter Selection Engine

The purpose of the Supporter Selection Engine is to enable you to select or query "Supporters" based on a wide variety of criteria.

1. Choose a field name from the yellow outlined drop down box on the left.
2. Select criteria relating to this field that appears on the right side of the screen, where the help currently appears.
3. Each field will produce a different list of criteria to choose from.
4. To choose additional fields click on the small drop down box on the left to choose 'and' 'or' for the next field.

> And = the supporter must be part of both criteria to be selected
> Or = the supporter must be part of at least one but could be both criteria to be selected

5. Select criteria relating to this field and so on

There are many other options available in the selection engine:

- Move Up or Down changes the order of the field you have chosen

- Show Parentheses feature allows the user to state very explicit selection rules

- Description of Criteria Selected allows you to type the criteria you have chosen in order to show the information on reports

- The Clear button will clear the fields you have chosen so you can start a new request for data

- The Load button will load a previously saved Query

- The Save button saves a query that you built with an existing name

- The Save As button will save a query with a new name

- The Classification Tool uses the current Supporter Selection and adds or removes them from a new or existing classification

- The Count button provides a count of the supporters for the criteria you have chosen in the Selection Engine

- The Continue button will take you to a chosen report when you enter the Supporter Selection Engine from a report prep screen

Example Query 1:
List all Supporters that are classified as a Business and have donated more than $500 in 2018.

From the Main Menu click the Supporters button
In the Supporters Search screen click the Open SSE button and choose the following:

                 Classifications = All Businesses

       And

                 Payment = see below

Example Query 2:
List all Supporters that donated $500 or more in 2018 only to the 2018 Golf Tournament Appeal.

From the Main Menu click the Supporters button
In the Supporters Search screen click the Open SSE button and choose the following:
Campaign Contributed to = see below

The "Like" Operator is used with Campaign Contributed To, Email, Name, Phone, Primary Address, Primary City, Primary State, Primary Zip and the Solicitor fields on the left

Use the "%" character any time you want to represent zero or more characters.
    For example, entering "New%" when searching the state field would find New York, New Jersey, New Hampshire and New Mexico.

Use the "_" (underscore) any time you want to represent a single character.
    For example, entering "_ean" when searching first names would find all four-letter first names that end with ean (Dean, Sean, etc.).

If you want to represent a single character within a specified range, use "[ ]". You can state it one of two ways: "[a-f]" or "[abcdef]".
    For example, entering "[C-P]arsen" when searching first names would find last names ending with arsen and beginning with any single character between C and P, like Carsen, Larsen, Karsen, and so on.

If you want to represent a single character NOT within a specified range, use "[^]". You can state it one of two ways: "[^a-f]" or "[^abcdef]".
    For example, when searching last names, entering "de[^l]%" would find all last names beginning with de where the third letter is not l.