



# Santa Clara University School of Law

## The Raiser's Edge Query/ Export And Report Request form

<b>Today's Date:</b>	<b>Date Needed:</b> (Please allow 7-10 <u>business</u> days)
<b>Name:</b>	<b>Extension:</b>

**How will you use this output? (Please be as specific as possible):**  
**Ex: Event (name of event) Postcard mailing -approx date at printer, approx date at mail house date. Broadcast email to be sent following mailing – approx date.**

**Please check all that apply.**

<input type="checkbox"/> Phone calls for visits to alums/donors	<input type="checkbox"/> Mail solicitation	<input type="checkbox"/> Prospecting/Research	<input type="checkbox"/> Broadcast Email -BBNC* Date of Email:
<input type="checkbox"/> Departmental Information Mailer	<input type="checkbox"/> Newsletter/Magazine	<input type="checkbox"/> Event Invitation	<input type="checkbox"/>
<input type="checkbox"/> Other (please specify):			

\*Broadcast Email- include email content and design in html format – subject to BBNC scheduling

**Query Selection Criteria (Please be as specific as possible):**  
*(Ex. All 1975 law alumni with lifetime giving of \$10K+ living in New York)*

**Include Only:**  Individuals     Organizations     Both

**Exclusions to Apply:**

The following exclusions are customary: **Deceased, Inactive, and FERPA**

<input type="checkbox"/> No Mail	<input type="checkbox"/> No Email address
<input type="checkbox"/> No Solicitations	<input type="checkbox"/> Active Pledges
<input type="checkbox"/> No Phone Solicitations	<input type="checkbox"/> Gifts this fiscal Year
<input type="checkbox"/> Do Not Contact	<input type="checkbox"/> International Addresses
<input type="checkbox"/> Requests No Emails	<input type="checkbox"/> Pledge Refusals for this fiscal year
<input type="checkbox"/> Founders	<input type="checkbox"/> Current Parents
<input type="checkbox"/> Nobili Society	<input type="checkbox"/> Past Parents
<input type="checkbox"/> Regents	<input type="checkbox"/> Dual Degree Holders
<input type="checkbox"/> Trustees	<input type="checkbox"/> No Valid Address
<input type="checkbox"/> Fellows	<input type="checkbox"/> No Phone Number
<input type="checkbox"/> Alumni Year(s): Type(s): <input type="checkbox"/> all except Law	<input type="checkbox"/> Prospect Status Type(s): <input type="checkbox"/> Top 30 <input type="checkbox"/> Next 50 <input type="checkbox"/> Discovery <input type="checkbox"/> Stewardship <input type="checkbox"/> Spouse Status

Sort by:  Alpha  Zip  Class Year  Lifetime Giving  Current FY Giving  PM  Other (please explain)

**Export Data Fields:**

**Head of Household Export Processing:**  Export only constituents marked "Head of Household"  
 Export first constituent found  Export both constituents separately

<input checked="" type="checkbox"/> Raiser's Edge ID Number	<input type="checkbox"/> Constituency (ie: Alumni, Parent, Friend, etc...)
<input type="checkbox"/> Name	<input type="checkbox"/> Spouse Constituency
<input type="checkbox"/> First Name	<input type="checkbox"/> Household Addressee (select): <input type="checkbox"/> Formal <input type="checkbox"/> Informal
<input type="checkbox"/> Last Name	<input type="checkbox"/> Household Salutation (select): <input type="checkbox"/> Formal <input type="checkbox"/> Informal
<input type="checkbox"/> Nickname	<input type="checkbox"/> Individual Addressee (select):
<input type="checkbox"/> Spouse Name	<input type="checkbox"/> Individual Salutation (select):
<input type="checkbox"/> Preferred Address	<input type="checkbox"/> Employer Name
<input type="checkbox"/> Home Address	<input type="checkbox"/> Position
<input type="checkbox"/> Business Address	<input type="checkbox"/> Reunion Classes
<input type="checkbox"/> Phone (select type/s): <input type="checkbox"/> Home <input type="checkbox"/> Bus <input type="checkbox"/> Phone <input type="checkbox"/> Cell	<input type="checkbox"/> Spouse Reunion Classes
<input type="checkbox"/> Email (select type/s): <input type="checkbox"/> Preferred <input type="checkbox"/> Bus <input type="checkbox"/> Campus <input type="checkbox"/> Email (Personal)	<input type="checkbox"/> Current FY Giving (select funds): <input type="checkbox"/> All <input type="checkbox"/> Law
<input type="checkbox"/> Ratings (select type/s): <input type="checkbox"/> BB-Law <input type="checkbox"/> WE <input type="checkbox"/> BBWP-Law	<input type="checkbox"/> Last FY Giving (select funds): <input type="checkbox"/> All <input type="checkbox"/> Law
<input type="checkbox"/> Prospect Status	<input type="checkbox"/> Lifetime Giving (select funds): <input type="checkbox"/> All <input type="checkbox"/> Law
<input type="checkbox"/> Prospect Manager	<input type="checkbox"/> Last Gift Amount (select funds): <input type="checkbox"/> All <input type="checkbox"/> Law
<input type="checkbox"/> Region	<input type="checkbox"/> Last Gift Date (select funds): <input type="checkbox"/> All <input type="checkbox"/> Law
<input type="checkbox"/> Other (please specify):	

**Export File Format:**

<input type="checkbox"/> Excel File	<input type="checkbox"/> Comma Separated Text File
<input type="checkbox"/> Counts/ Totals Only	<input type="checkbox"/> Other (please specify):

**RE Report Option:**

Gift Detail and Summary Report (select one):  Detail Report  Summary Report  Both  
Fund Numbers to include (please specify):  
Giving Date Range (please specify):  
Fields to include (for Detail Report only) – Select one:  Name/ID  Name/ID/Address

**For Programmer Use Only:**

<b>Query Name:</b>	
<b>Export Name:</b>	
<b>Set Up By:</b>	<b>Date:</b>

Please complete this form and e-mail it to [srosas@scu.edu](mailto:srosas@scu.edu) for processing.