

Q-Xpress Review

An introduction to Q-Xpress

Q-Xpress is used to create extractions for mailing or email lists.

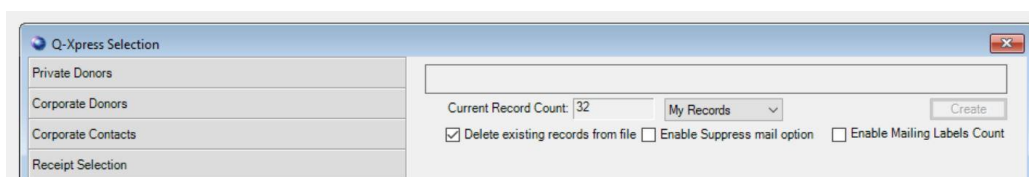
It is used to identify a group of donors through its many selections and assign values through the Assign window to selected records for reporting purposes.

Q-Xpress has the ability to globally assign and globally delete values found on donor records.

The Preview option provides quick listings and the Filter option lets you isolate groups of records based on specific criteria. When using the Preview, be sure to select the Printer first. Using a PDF printer can be useful to create a shareable output.

*** Q-Xpress Selections has a My Records pull-down. This should **ALWAYS** be set to **My Records** as the user may get other user data in their view.

As @EASE can have multiple users, each user has their own selection of records which they use to export, run Excludes options, and assign values to or list through Preview. Each user has **My Records** and they would **NEVER** use **ALL Records** as functions like Excludes and Assigns only address records for the current user signed in.



Q-Xpress Exclusions

You can exclude or remove Q-Xpress records from the file using the following criteria. In most cases, the Significant Other can be excluded as well depending on the selection.

1. **Postal / Zip Code:** Donors with a primary postal / zip code in the range you specify will be removed from the file.

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2. **Last Solicitation Date:** Donors whose last solicitation date resides in the given range will be removed from the file. Solicitation Date can be updated at Label Export time; this prevents donors from being over-solicited.
3. **Campaign:** Donors who have donated to a specific campaign will be removed from the file. A date range can be used to further qualify the selection. An option called **Including Significant Other** exists for situations where a Q-Xpress export file has been created with the Suppress Mail option active and either partner can activate the exclude activity.

This option looks to see if the **ToWhom2** Q-Xpress field has been populated. In a case where the field is populated, indicating that Suppress mail was activated for the record's selection, @EASE will exclude the record if either the primary donor or the significant other has donated.

4. **Membership:** Donors with a specific membership can be excluded. This option automatically reviews both the primary donor and the significant other donor where a record was added to the Q-Xpress file with the suppress mail option active. You can tell if the suppress mail option was activated if the ToWhom2 field is populated.
5. **Quality:** Donors with a specific quality can be excluded. This option automatically reviews both the primary donor and the significant other donor where a record was added to the Q-Xpress file with the suppress mail option active. You can tell if the suppress mail option was activated if the ToWhom2 field is populated.
6. **Status:** Donors with a specific activity status can be excluded, deceased or if Opt-in is blank.
7. **By Contact:** A situation may exist where an individual's record exists on the Private Donor file and as a Contact for a Corporate record. Where the private record is documented on the Corporate Contact window by entering the Private Donor Record number, @EASE gives the option of removing either all Private records **or** all Corporate Contact records, where the person has been included from both perspectives.

Further to this exclusion, @EASE now looks at the Corporate Master record should it be included with the individual as the Key Corporate Contact (the name noted on the Corporate Master Record).

For example:

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Robert Bell has been selected as a Private Donor number P100002. He is a contact for Sunny Garden Greenhouses and his contact record references his Private Donor Record P100002.

Sunny Garden is C100003 and the key contact for the company is Robert.

If all three records are on the Q-Xpress file and we remove all contacts, both the Corporate record for Sunny Garden and the Corporate Contact record for Robert will be removed.

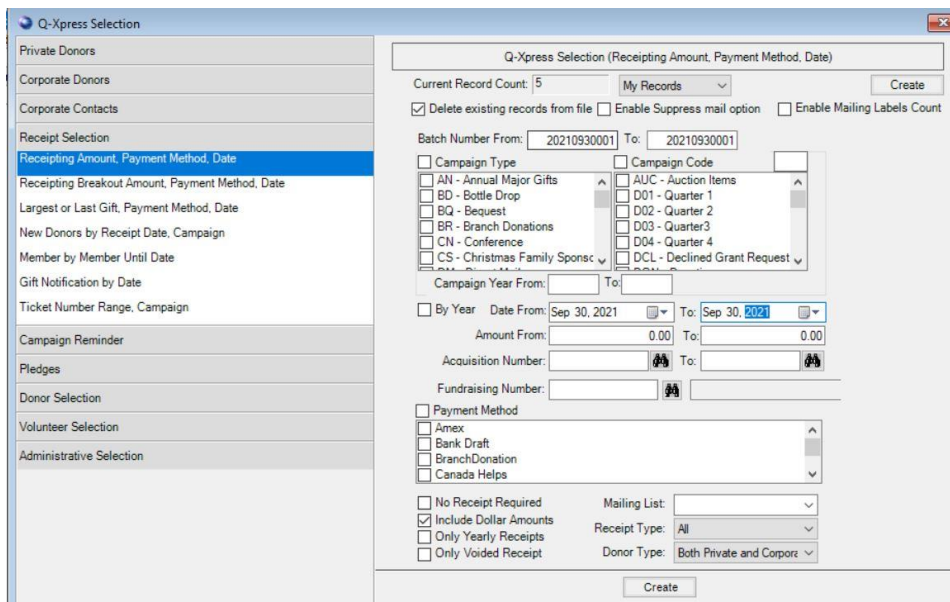
Using Q-Xpress to Export Donations from a Batch

To extract all donations from a Batch for letters or further checking, go to Q-Xpress Selection and click on Receipt Selection.

The window below will extract all transactions from batch 20210930001 that have the date Sept 30, 2021.

To ensure you get all details found on each record, check off Include Dollar Amounts.

To view the records, go to the Q-Xpress menu and select Q-Xpress View.



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Using Q-Xpress Preview

You have a list of records selected through Q-Xpress. It maybe a list of potential sponsors for your next event.

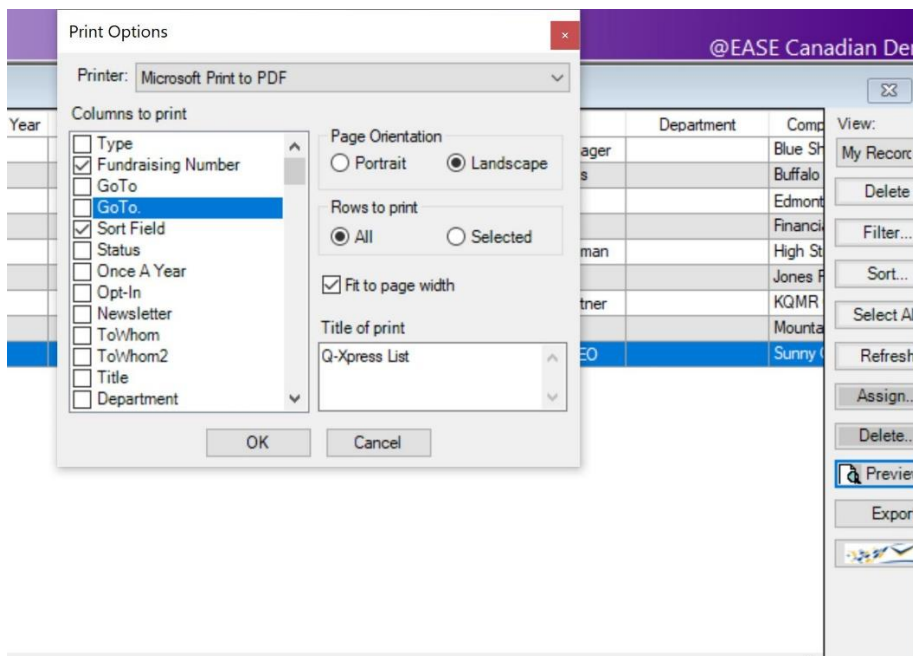
A quick phone list might be handy. Using Q-Xpress you select a list of sponsors by pulling a list of all past event sponsors.

Type	Fundraising	GoTo	GoTo	Sort Field	Status	Once A Year	Opt-In	Newsletter	ToWhom	ToWhom2	Title	Department	Company Name
C	C002279			Blue Shield Appraisal Inc Elwood	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dale Elwood		Regional Manager		Blue Shield
C	C003481			Buffalo House Bar and Grill Bamford	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jamie Bamford		Special Events		Buffalo House Bar
C	C003477			Edmonton Journal Hughes Valerie	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ms Valerie Hughes		Editor		Edmonton Journal
C	C001505			Financial Ventures Inc. Smith Ruby	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Miss Ruby Smith		Community		Financial Ventures
C	C000151			High Street Marketing Anderson	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marilyn Anderson		Director of Human		High Street
C	C001878			Jones Professional Corp Wilson	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	James Wilson		Partner		Jones Professional
C	C002877			KQMR Consult Services Stone	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wynona Stone		Managing Partner		KQMR Consult
C	C003038			Mountain View Music Jackson	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lincoln Jackson		President		Mountain View
C	C000776			Sunny Garden Holdings Ltd.	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr Arnold Reischer		President & CEO		Sunny Garden

To create a listing of organization names and numbers use the Preview button found on the right-hand vertical menu.

Click on Review and the Print Options menu appears.

The first order is to select the printer. In this case a PDF printer was selected.



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Select the Page Orientation and which rows to print. You can provide a title if desired.

Check off the fields to be listed. Keep in mind this is a Listing and not a Report. If too many fields are selected based on the Orientation chosen, fields begin to shrink in size and data can be lost from view. Click OK when done and print the output. Selecting PDF will create a file you can store for shared use. For our example, we chose Sort Field, two phone numbers and the contact's email.

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Fundraising Number	Sort Field	Phone Type 1	Phone Number 1	Phone Type 2	Phone Number 2	Email 1
C002279	Blue Shield Appraisal Inc Elwood Dale	Business	(780) 463-0462	Fax	(780) 463-0400	delwood@blueshield.com
C003481	Buffalo House Bar and Grill Bamford Jamie	Business	(780) 489-1111	Fax	(780) 489-1100	jamie@buffalobarandgrill.com
C003477	Edmonton Journal Hughes Valerie	Business	(780) 498-5500	Fax	(780) 498-5501	editor.edmonton@southam.com
C001505	Financial Ventures Inc. Smith Ruby	Business	(780) 547-4733	Fax	(403) 547-4700	ease@batschgroup.com
C000151	High Street Marketing Anderson Marilyn	Business	(403) 251-2379	Fax	(403) 243-4411	manderson@highstreet.com
C001878	Jones Professional Corp Wilson James	Business	(780) 342-6825			jwilson@jonesprof.ca
C002877	KQMR Consult Services Stone Wynona	Business	(780) 433-1119			w.stone@kqmr.com
C003038	Mountain View Music Jackson Lincoln	Business	(780) 601-2573			Jackson@musicview.com
C000776	Sunny Garden Holdings Ltd. Fleischer Arnold	Business	(403) 249-0124	Cell	(403) 877-1234	arnold@sunnygarden.com