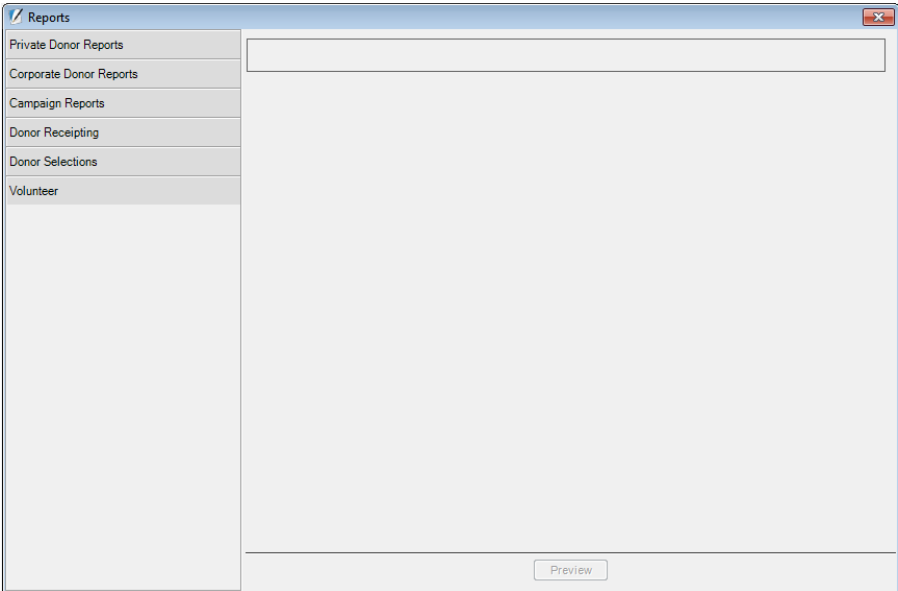


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Reports

@EASE offers several reports that are beneficial when printed lists are required.

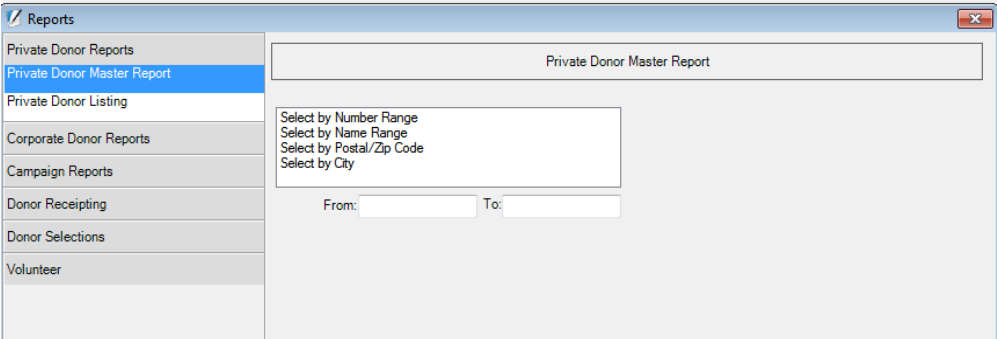


Corporate and Private Donor Listing

Private and Corporate files offer a quick listing under Donor Listing by Quality, Membership or Interest Area. These listings do not include contacts. Extracts through Q-Xpress are often used in place of these reports as the selection can include private and corporate records.

Once a listing type is selected the criteria checked can be further defined to be an And or Or search.

In this case, both Active and Inactive records will list on the report.



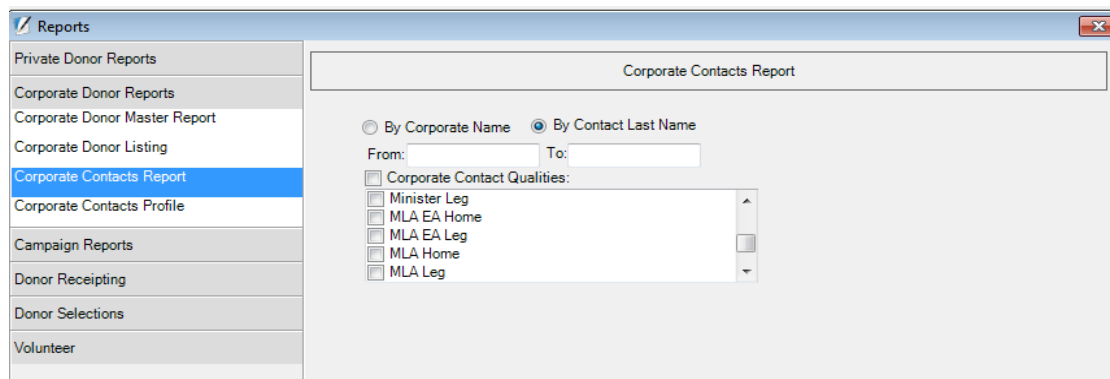
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Corporate Contacts Report

This report will print alphabetically by company name with all contacts listed alphabetically within the company, or it can list alphabetically by contact name.

This report provides the title, phone and email information for all contacts selected.

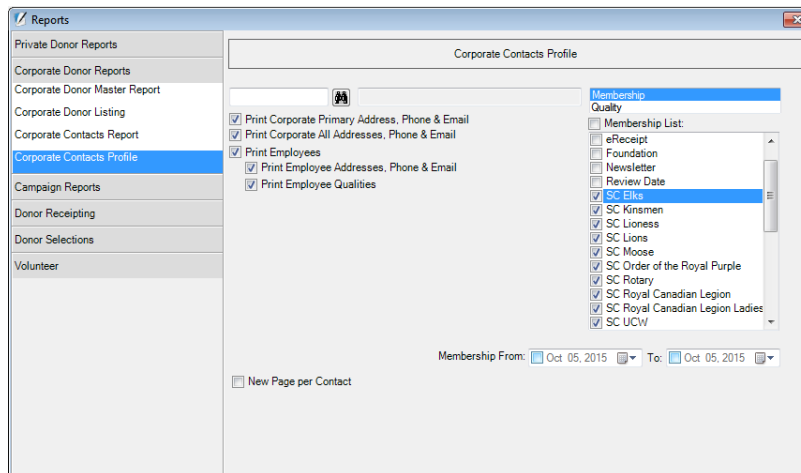
Where no Corporate Contacts Quality is selected, all records will print.



Corporate Contacts Profile Report

This report is very useful, and depending on how Corporate master records are defined, this report will show by Corporate Quality or Membership, all employees with address, email, phone, title, private donor links and quality codes.

Keeping information up-to-date is never easier when using this report.



Note the New Page option for groups with lengthy listings.

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Report Functions

Once a report has been created it needs to be closed to return to @EASE.

All reports provide the opportunity to Export to PDF, XLS or DOC formats.



Clicking the icon at the far left provides a series of selections.

The printer icon uses the default printer as defined by the user's computer.

The binoculars allow for larger views and search options.

The arrows move you from page to page.

Extracting Records using Q-Xpress

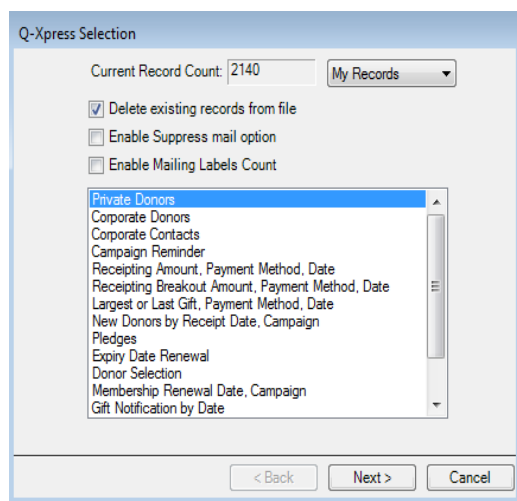
Our preference is to use Q-Xpress for extractions. The Preview option provides a printed report. We recommend the installation of a PDF printer option so that listings can be retained.

Selections through Q-Xpress provide the option to append different listings.

Where coding for specific types of lists include Private, Corporate and Contact records, this is beneficial.

Extractions can be viewed through the Q-Xpress View window which provides sort, filter, and global Assign and Delete options.

Further list management can be done by simply removing records from a list with a Delete option or by using the Q-Xpress Exclude utility which offers several exclude types.



Q-Xpress

The Current Record count when entering Q-Xpress is displayed.

My Records will always be used by each person using @EASE and **NEVER All Records**.

Delete existing records from file: Implies a fresh list. When un-checked, records are appended to an existing list.

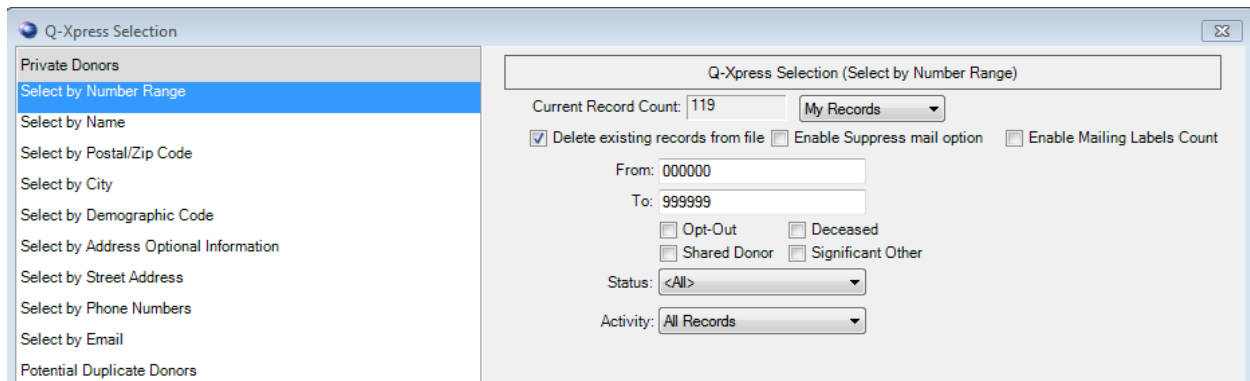
Enable Suppress mail option is used to place significant other couples on the sample output record.

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Enable Mailing Labels Count is rarely used if ever and will become obsolete.

Select the record selection and Click Next to move to further options based on what is chosen.

Private & Corporate Record Selections



Status uses the status shown on the master record window.

- Both/ Active and Inactive
- Active
- Not for Fundraising
- Inactive
- Permanently (Inactive)

Activity:

- All Records
- Only Donors
- Only Non-Donors
- Only Volunteers

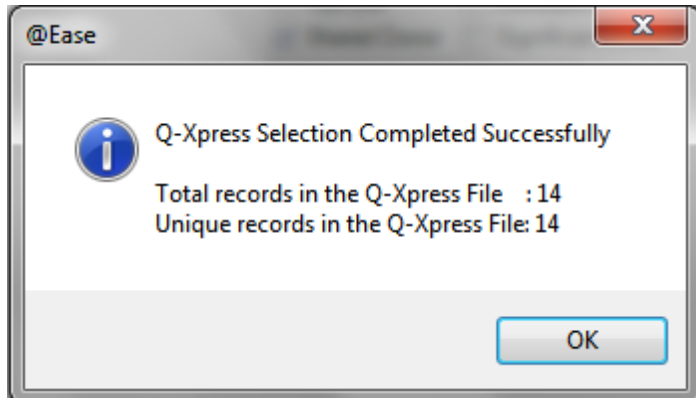
Opt-Out or Deceased or Shared Donor or Significant Other can be selected as a sub-selection of the other fields.

Wild card characters can be used to select records. For example, all private records with a residence in a specific postal zone can be found by entering T6M*.

Pull down menus exist for City and Demographic Code.

Click **Finish** to begin the record selection.

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In my sample I selected all individuals whose name started with A . I entered A* in the name field.

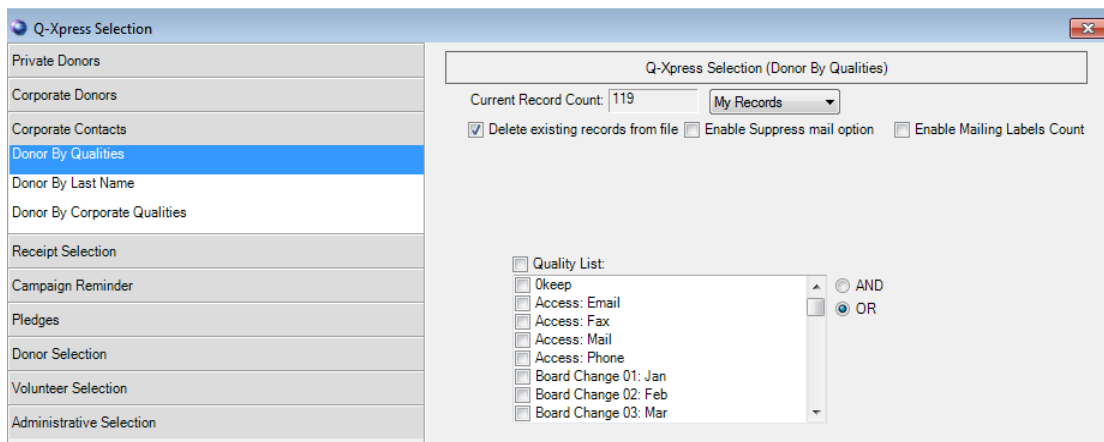
Once finished, this window displays the total records and the number of unique records as defined by the Sort field in Q-Xpress.

There are instances where the unique record count is different from the Total

records. This only occurs when multiple selections are made using different criteria.

Click OK and if you have completed the selection upon return to the Q-Xpress Select window click the **Cancel** button and Finish means ... let's do it again!

Contact Selections



Select contacts by one or more qualities, by last name or select all contacts that work for Corporate records with a Quality found on the corporate record.

For example, all Media personal based on Media being a Quality found on Corporate records.

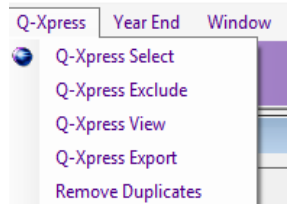
Donor Selections

Donor selections will find records by Quality (private and corporate only), Donor Interests, Donor Recognition and Memberships. Where these selections are made if an OR or And is used with more than on option selected multiple records appear with the values selected housed in Profile Description and Profile Date where applicable.

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Q-Xpress Menu

Extracting records for use in letters, labels, updates to your donor wall and more are easy to run and accurate.



The Q-Xpress menu has Exclude, View, Export and a Remove Duplicates Option.

View takes us to a window where we can manage the selected list.

Export is used for Mail Merge activity.

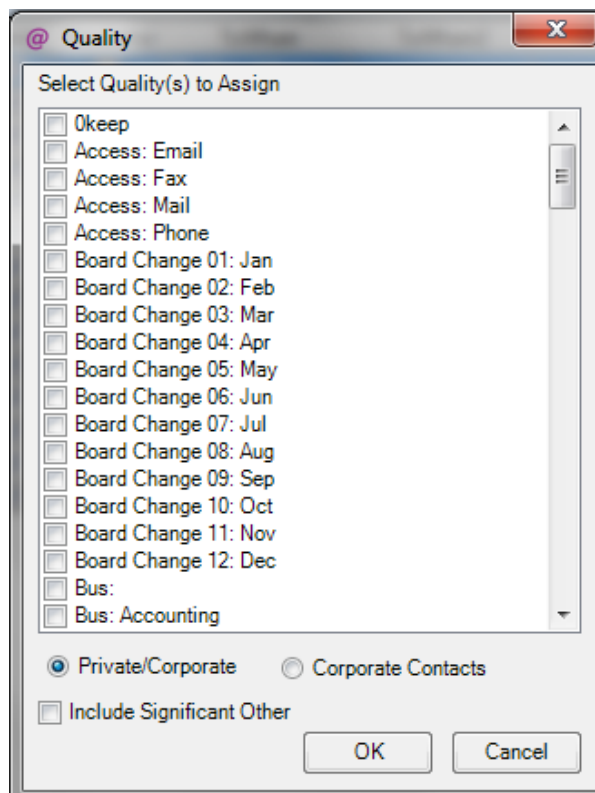
Exclude removes records by criteria selected by the user and

Remove Duplicates ensures only one record per Sort field entry on the Q-Xpress list.

Q-Xpress Format

A full inside address and greeting field is created with every Q-Xpress selection. All phone numbers and email, language preference, demographic code and more.

Selected fields like Qualities, Donor Interests, Memberships and Donor Recognition are recorded in the Profile Description and Profile Date fields.



@EASE Help has a full list of all the fields that are now ready for extraction from @EASE.

For word processing activity we recommend the use of the Q-Xpress Export menu option.

Q-Xpress View:

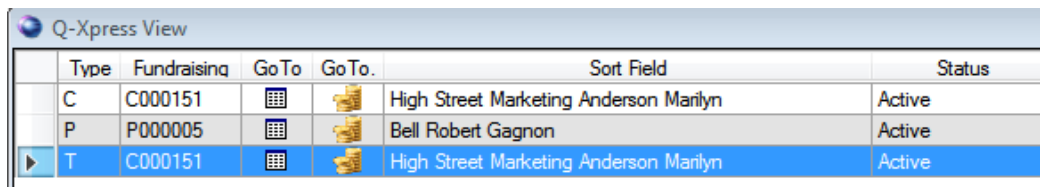
Columns can be frozen by a right click and Freeze on any of the column headers.

The menu options on the far right provide further ways to manipulate the list shown in the window.

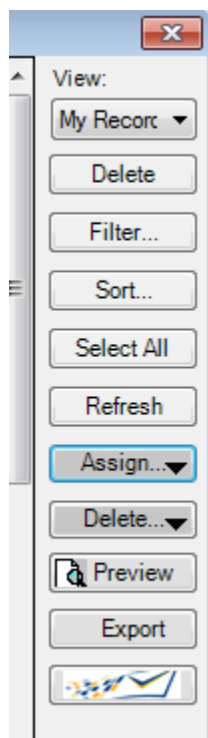
Global Assign and Global Delete can be used for several of the fields in @EASE. Where working with Qualities, we separate activities when working with Private / Corporate records and Contact records. **Please note** the radio buttons on these windows.

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The **Type** field at the far left of the View window shows P, C or T. T identifies Contact records.



Type	Fundraising	GoTo	GoTo.	Sort Field	Status
C	C000151			High Street Marketing Anderson Marilyn	Active
P	P000005			Bell Robert Gagnon	Active
T	C000151			High Street Marketing Anderson Marilyn	Active



- Delete removes highlighted records from the list and only the list
- Filter finds selections of records based on the filter criteria
- Sort offers two levels of sort. Clicking on any of the column headers offers one level of sort only.
- Select All highlights all records
- Refresh changes the view after further additions or the Q-Xpress Exclude is used.
- Assign is used to assign values to the records found in the view. Records with a Type of T are contact records, and this affects Quality assigns.
- Delete removes values from records found in the view.
- Preview is a listing option.
 - Select the printer to be used first (A PDF printer is handy.)
 - Check the boxes to display. Too many boxes with truncate fields.
- Export will export all highlighted records in an XML format. This can be opened in Excel and using Save As saved as an XLS file. A message often appears indicating the file is in a different format. Just continue and you will view all selected records.
- The Constant Contact icon lets you take the selected records and move them into a CC list if you are a CC user.

Q-Xpress is a particularly useful area and one we frequently use to create listings.