

Strategic Scorecard

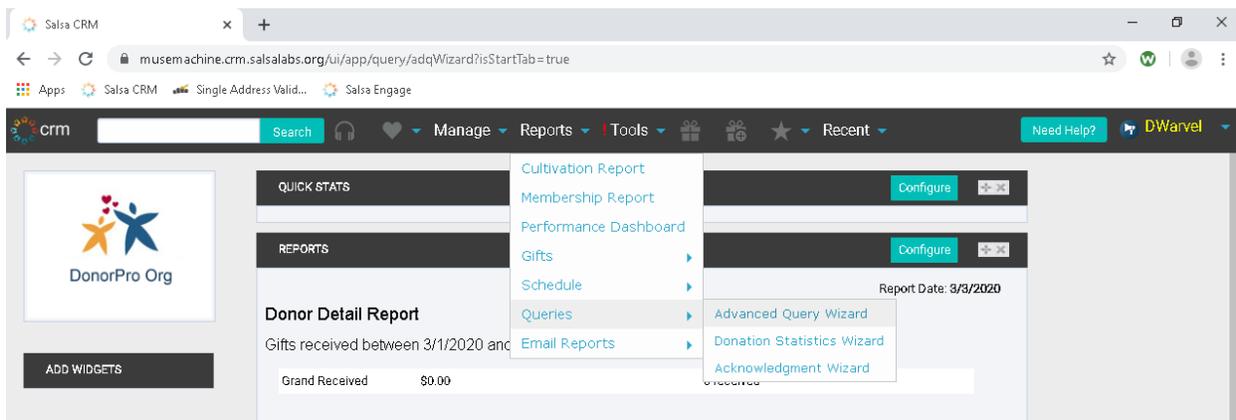
The Strategic Scorecard provides an overall view of Muse Machine. Used internally by staff and confidentially by the Board of Trustees (BoT), the scorecard is updated by program areas, finance, and development. Development is often asked to update the scorecard multiple times throughout the month.

The scorecard is located at \Muse Shared\Reports-Dashboard for Committee-Board\20XX-20XX. Within the appropriate year folder, there is a Previous Versions folder. **The naming standard for the Strategic Scorecard is 2018-19 Muse Machine Strategic Scorecard_20190807-v2**, with “-v2” being added only if there is more than one version made on the same day. As the scorecard is updated the name of the file should be updated using the naming standard and the previous version should be moved into the Previous Versions folder.

Scorecard Process

The Strategic Scorecard has been formatted to allow for autofill options to help to eliminate data entry errors. Development has a tab dedicated to each section with built-in pivot tables to help with data analysis.

- **Dev- Grants** tab contains all information for current fiscal year grants.
 - o Run the Salsa Advanced Query *Annual Grants*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Grants* query

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY WIZARD

QUERY WIZARD

Saved Queries Built-in Queries Saved Query Results Import Create New Query

Search all columns: Show 10 entries

ID	Created	Updated	Author	Type	Last Run	Smart Group	Description
2391	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:06:06 AM		Annual Grants
2533	09/26/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:58:37 PM		Current and Pr Annual Grants restricted Individual Giving- for Dashboard
2479	08/27/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:53:54 PM		Annual Unrestricted Individual Giving
2395	08/05/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:42:33 PM		Endowment Campaign for Educator Excellence Gifts
2059	03/12/2019	02/28/2020		Donation	Feb 28, 2020, 1:00:29 PM		For TY Letters Mail Merge Export
2705	12/10/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:43:19 AM		Annual Benefit Dinner
2396	08/06/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:40:37 AM		All Annual Social & Show Gifts
2397	08/07/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:30:13 AM		Annual Restricted Individual Giving
2394	08/05/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:23:23 AM		Circle of Friends
2393	08/05/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:20:27 AM		Annual Sponsorships

Showing 1 to 10 of 147 entries

Refresh Delete this Query Definition. Next

- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY DONATION

QUERY WIZARD

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Filter Sort Key

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID
- Donation Description

Add Calculation...

Merge Spouses Merge Exact Duplicate Results

Filter Fields

Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.' and Appeal Appeal ID is one of 'Grant Application Grant Application' and (Fund Items Payment Type does not equal 'Gift in

Edit. And Or ()

Sort Fields

Fund Items Fund Name ascending

Pledge Fund Items Fund Name ascending

Donation List As Name ascending

Ascending Descending

Restart Wizard Back Next Finish

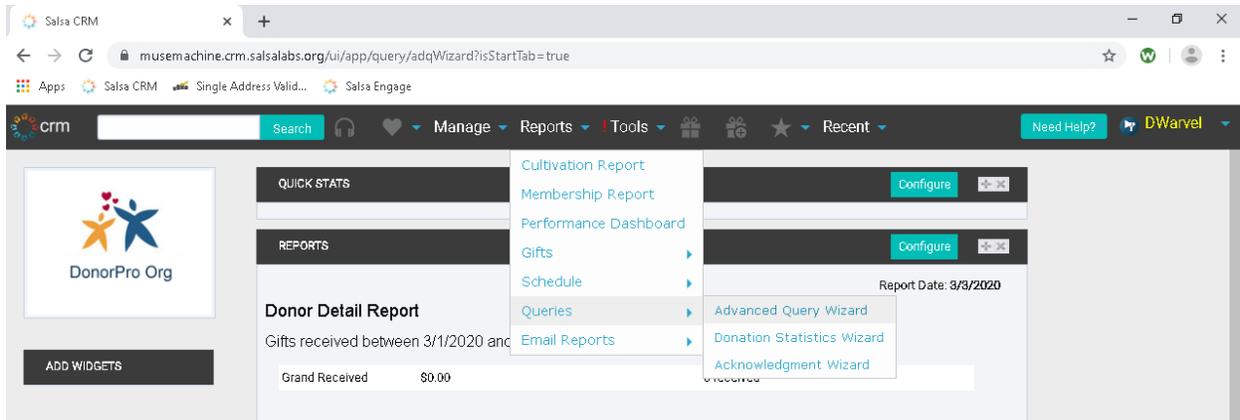
- Click Next
- After the results have populated, click Convert to Spreadsheet

The screenshot shows the Salsa CRM interface with the Advanced Query Wizard open. The wizard is at Step 3: Preview, Exclude, and Modify Data. The table below displays the results of the query.

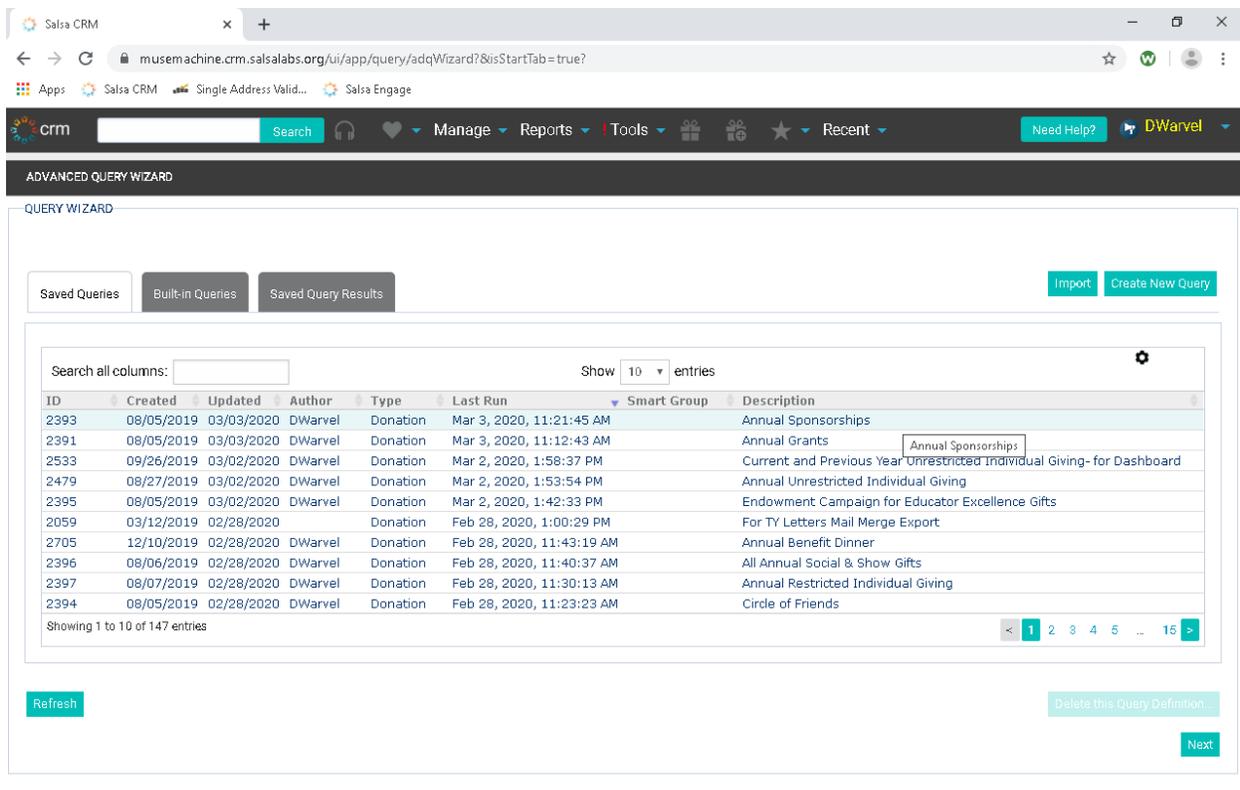
List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name
<input checked="" type="checkbox"/> PNC Foundation	PNC Foundation		2019-2020 Annual		Prescho
<input checked="" type="checkbox"/> National Endowment for the Arts	National Endowment for the Arts		2019-2020 Annual		Seconda
<input checked="" type="checkbox"/> The Allegro Fund of The Dayton Foundation	The Allegro Fund of The Dayton Foundation		2019-2020 Annual		Seconda
<input checked="" type="checkbox"/> Ohio Arts Council	Ohio Arts Council		2019-2020 Annual		Summer
<input checked="" type="checkbox"/> Culture Works	Culture Works		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Montgomery County Arts & Cultural District	Montgomery County Arts & Cultural District		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Ohio Arts Council	Ohio Arts Council		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Dayton Power & Light Foundation	Dayton Power & Light Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> PNC Foundation	PNC Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> The Frank M. Tait Foundation	The Frank M. Tait Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> Dayton Power & Light Foundation	Dayton Power & Light Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Allegro Fund of The Dayton Foundation	The Allegro Fund of The Dayton Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Iddings Foundation	The Iddings Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Iddings Foundation	The Iddings Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Secondary Special Projects	

At the bottom of the wizard, there are buttons for "Convert to Spreadsheet", "Restart Wizard", "Back", "Next", and "Finish".

- The raw data that comes out of Salsa will need to be manipulated.
 - Move data in Fund Name2 into the Fund Name column.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- Ensure that the Summary data table total matches the All Grants pivot table total.
- **Dev- Sponsorships** tab contains all information for current fiscal year sponsorships.
 - Run the Salsa Advanced Query *Annual Sponsorships*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Sponsorships* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adcWizard?&isStartTab=true?

Apps Salsa CRM Single Address Valid... Salsa Engage

Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY DONATION

QUERY WIZARD

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UIID
 - Donation Source Activity UIID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Filter Sort **Key**

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID
- Donation Description

Add Calculation...

Merge Spouses Merge Exact Duplicate Results

Filter Fields

Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.'

and Appeal Appeal ID equals 'Sponsorship Proposal Sponsorship Proposal'

and (Fund Items Payment Type does not equal 'Gift in

Edit... And Or ()

Sort Fields

Ascending Descending

Restart Wizard Back Next Finish

- Click Next
- After the results have populated, click Convert to Spreadsheet

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adcWizard?&isStartTab=true?

Apps Salsa CRM Single Address Valid... Salsa Engage

Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY DONATION

QUERY WIZARD

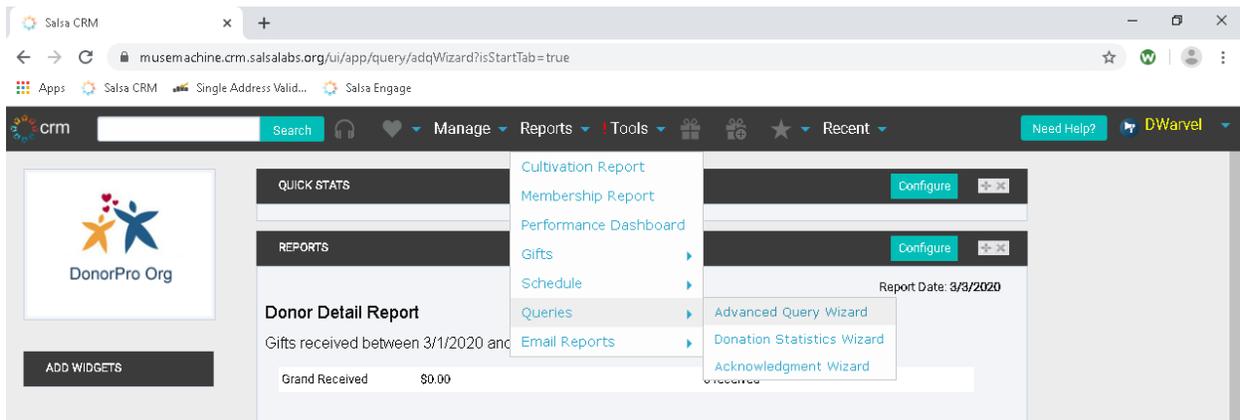
Step 3: Preview, Exclude, and Modify Data.

<input checked="" type="checkbox"/>	List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name
<input checked="" type="checkbox"/>	Key Bank	Key Bank		2019-2020 Annual		Preschool & Ele
<input checked="" type="checkbox"/>	Key Bank	Key Bank		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/>	Jackie Lockwood	Lockwood	Jackie	2019-2020 Annual	Secondary Programs	
<input checked="" type="checkbox"/>	Patti Giering	Giering	Patricia	2019-2020 Annual	Student Performance	
<input checked="" type="checkbox"/>	The Dupps Company Charitable Foundation	The Dupps Company		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/>	The Jesse and Caryl D. Phillips Foundation	The Jesse and Caryl D. Phillips Foundation		2019-2020 Annual		Student Perform
<input checked="" type="checkbox"/>	The Mary H. Kittredge Fund	The Mary H. Kittredge Fund		2019-2020 Annual	Summer Institute	
<input checked="" type="checkbox"/>	Centerville Noon Optimist Club	Centerville Noon Optimist Club		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/>	Hartzell Propeller, Inc.	Hartzell Propeller, Inc.		2019-2020 Annual		Secondary Prog
<input checked="" type="checkbox"/>	Cargill, Inc.	Cargill, Inc.		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/>	The Schiewetz Foundation	The Schiewetz Foundation		2019-2020 Annual	Student Performance	
<input checked="" type="checkbox"/>	Dr. & Mrs. Robert Goldenberg	Goldenberg	Debby	2019-2020 Annual		Secondary Prog
<input checked="" type="checkbox"/>	Dr. & Mrs. Robert Goldenberg	Goldenberg	Debby	2019-2020 Annual	Secondary Programs	
<input checked="" type="checkbox"/>	Jackie Lockwood	Lockwood	Jackie	2019-2020 Annual	Summer Institute	
<input checked="" type="checkbox"/>	Anonymous	Kunesh	Sarah	2019-2020 Annual	Secondary Programs	
<input checked="" type="checkbox"/>	Anonymous	Campbell Zopf	Mary	2019-2020 Annual	Secondary Programs	
<input checked="" type="checkbox"/>	Zenith Advisory Group Jay A. Grandfield, CRPC Investment Advisor	Zenith Advisory Group		2019-2020 Annual		Secondary Prog

Convert to Spreadsheet

Restart Wizard Back Next Finish

- The raw data that comes out of Salsa will need to be manipulated.
 - Move data in Fund Name2 into the Fund Name column.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- Ensure that the Summary data table total matches the All Sponsorships pivot table total.
- **Dev- Circle of Friends** tab contains all information for all gifts related to the Circle of Friends campaign.
 - Run the Salsa Advanced Query *Circle of Friends*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Circle of Friends* query

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?&isStartTab=true?

Apps Salsa CRM Single Address Valid... Salsa Engage

crm Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY WIZARD

QUERY WIZARD

Saved Queries Built-in Queries Saved Query Results Import Create New Query

Search all columns: Show 10 entries

ID	Created	Updated	Author	Type	Last Run	Smart Group	Description
2394	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:33:22 AM		Circle of Friends
2393	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:24:29 AM		Annual Sponsorships
2391	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:12:43 AM		Annual Grants
2533	09/26/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:58:37 PM		Current and Previous Year Unrestricted Individual Giving- for Dashboard
2479	08/27/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:53:54 PM		Annual Unrestricted Individual Giving
2395	08/05/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:42:33 PM		Endowment Campaign for Educator Excellence Gifts
2059	03/12/2019	02/28/2020		Donation	Feb 28, 2020, 1:00:29 PM		For TY Letters Mail Merge Export
2705	12/10/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:43:19 AM		Annual Benefit Dinner
2396	08/06/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:40:37 AM		All Annual Social & Show Gifts
2397	08/07/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:30:13 AM		Annual Restricted Individual Giving

Showing 1 to 10 of 147 entries

Refresh Delete this Query Definition. Next

- Click Next, after the results have populated, click Convert to Spreadsheet

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?&isStartTab=true?

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ADVANCED QUERY DONATION

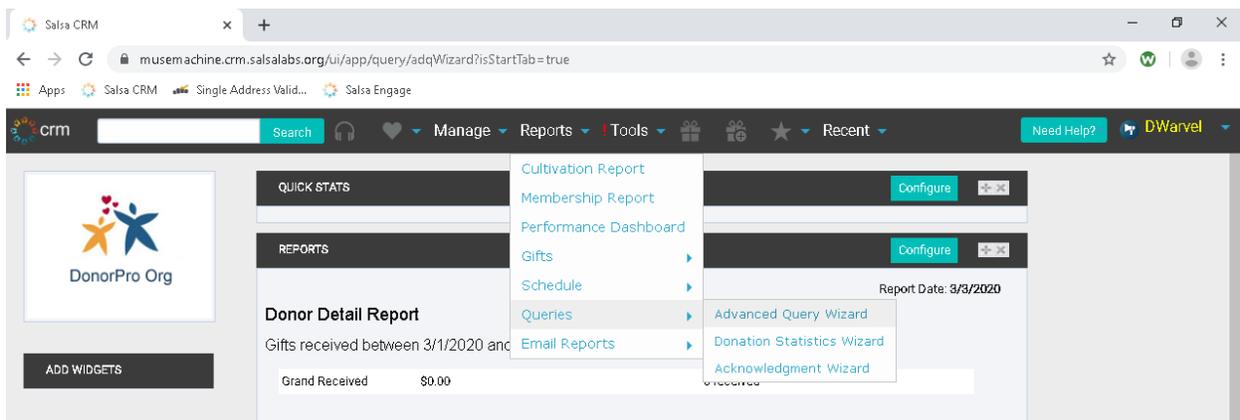
QUERY WIZARD

Step 3: Preview, Exclude, and Modify Data.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Appeal Name	Received Date	Donation Amount	Donation
<input checked="" type="checkbox"/> Albert & Susan Asebrook	Asebrook	Albert	Circle of Friends	Secondary Programs	2018 CoF	2017-09-21	1,250.00	Pled
<input checked="" type="checkbox"/> Mary Campbell Zopf	Campbell Zopf	Mary	Circle of Friends	Secondary Programs	2018 CoF	2017-09-21	1,250.00	Pled
<input checked="" type="checkbox"/> Anonymous	Giering	John	Circle of Friends	Secondary Programs	2018 CoF	2017-09-21	1,250.00	Pled
<input checked="" type="checkbox"/> Franz & Margaret Hoge	Hoge	Franz	Circle of Friends	Secondary Programs	2018 CoF	2017-09-06	1,250.00	Don
<input checked="" type="checkbox"/> Janet Graul	Graul	Janet	Circle of Friends	Secondary Programs	2018 CoF	2017-09-15	1,250.00	Don
<input checked="" type="checkbox"/> James Dicke	Crown Equipment Corporation		Circle of Friends	Secondary Programs	2021 CoF	2017-10-12	1,250.00	Don
<input checked="" type="checkbox"/> Herbert L. Lemaster	Lemaster	Herbert	Circle of Friends	Secondary Programs	2018 CoF	2017-11-10	1,250.00	Pled
<input checked="" type="checkbox"/> Dr. Christopher Danis	Danis	Christopher	Circle of Friends	Secondary Programs	2018 CoF	2017-11-16	1,250.00	Don
<input checked="" type="checkbox"/> Marsha & Stephen Goldberg	Goldberg	Stephen	Circle of Friends	Secondary Programs	2018 CoF	2017-12-06	1,250.00	Don
<input checked="" type="checkbox"/> Albert & Susan Asebrook	Asebrook	Albert	Circle of Friends	Secondary Programs	2018 CoF	2017-12-31	1,250.00	Don
<input checked="" type="checkbox"/> Marsha & Stephen Goldberg	Goldberg	Stephen	Circle of Friends	Secondary Programs	2020 CoF	2017-12-31	1,250.00	Don
<input checked="" type="checkbox"/> Monica Snow	Snow	Monica	Circle of Friends	Secondary Programs	2018 CoF	2018-01-14	1,250.00	Pled
<input checked="" type="checkbox"/> Monica Snow	Snow	Monica	Circle of Friends	Secondary Programs	2018 CoF	2018-01-14	1,250.00	Don
<input checked="" type="checkbox"/> Herbert L. Lemaster	Lemaster	Herbert	Circle of Friends	Secondary Programs	2018 CoF	2018-01-29	1,250.00	Don
<input checked="" type="checkbox"/> Anonymous	Giering	John	Circle of Friends	Secondary Programs	2018 CoF	2018-08-24	1,000.00	Don
<input checked="" type="checkbox"/> Anonymous	Giering	John	Circle of Friends	Secondary Programs	2019 CoF	2017-09-21	1,250.00	Pled
<input checked="" type="checkbox"/> Anonymous	Giering	John	Circle of Friends	Secondary Programs	2020 CoF	2017-09-21	1,250.00	Pled

Convert to Spreadsheet Restart Wizard Back Next Finish

- The raw data that comes out of Salsa will need to be manipulated.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
 - Copy the data and paste into the table in the Scorecard, replacing the former data.
 - Refresh the pivot table.
 - Ensure that the Summary data table total matches the pivot table total.
- **Dev- Unrestricted** tab contains all information for current fiscal year unrestricted gifts.
- Run the Salsa Advanced Query *Annual Unrestricted Individual Giving*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Unrestricted Individual Giving* query

Salsa CRM

museemachine.crm.salsalabs.org/ui/app/query/adqWizard?&isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

crm Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY WIZARD

QUERY WIZARD

Saved Queries Built-in Queries Saved Query Results Import Create New Query

Search all columns: Show 10 entries

ID	Created	Updated	Author	Type	Last Run	Smart Group	Description
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2394	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:35:34 AM		Circle of Friends
2393	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:24:29 AM		Annual Sponsorships
2391	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:12:43 AM		Annual Grants
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2395	08/05/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:42:33 PM		Endowment Campaign for Educator Excellence Gifts
2059	03/12/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 1:00:29 PM		For TY Letters Mail Merge Export
2705	12/10/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:43:19 AM		Annual Benefit Dinner
2396	08/06/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:40:37 AM		All Annual Social & Show Gifts
2397	08/07/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:30:13 AM		Annual Restricted Individual Giving

Showing 1 to 10 of 147 entries

Refresh Delete this Query Definition. Next

- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Salsa CRM

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ADVANCED QUERY DONATION

QUERY WIZARD

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Data Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Filter Sort Key

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID

Add Calculation...

Merge Spouses Merge Exact Duplicate Results

Filter Fields

Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.' and Appeal Appeal ID is not one of 'Grant Application Grant Applicant', 'Sponsorship Proposal Sponsorship Proposal'

Edit... And Or ()

Sort Fields

Ascending Descending

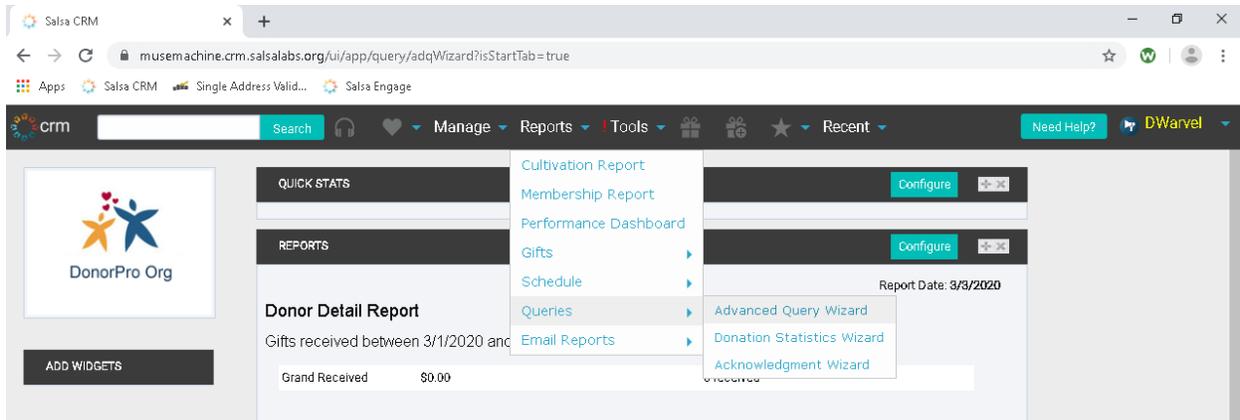
Restart Wizard Back Next Finish

- Click Next
- After the results have populated, click Convert to Spreadsheet

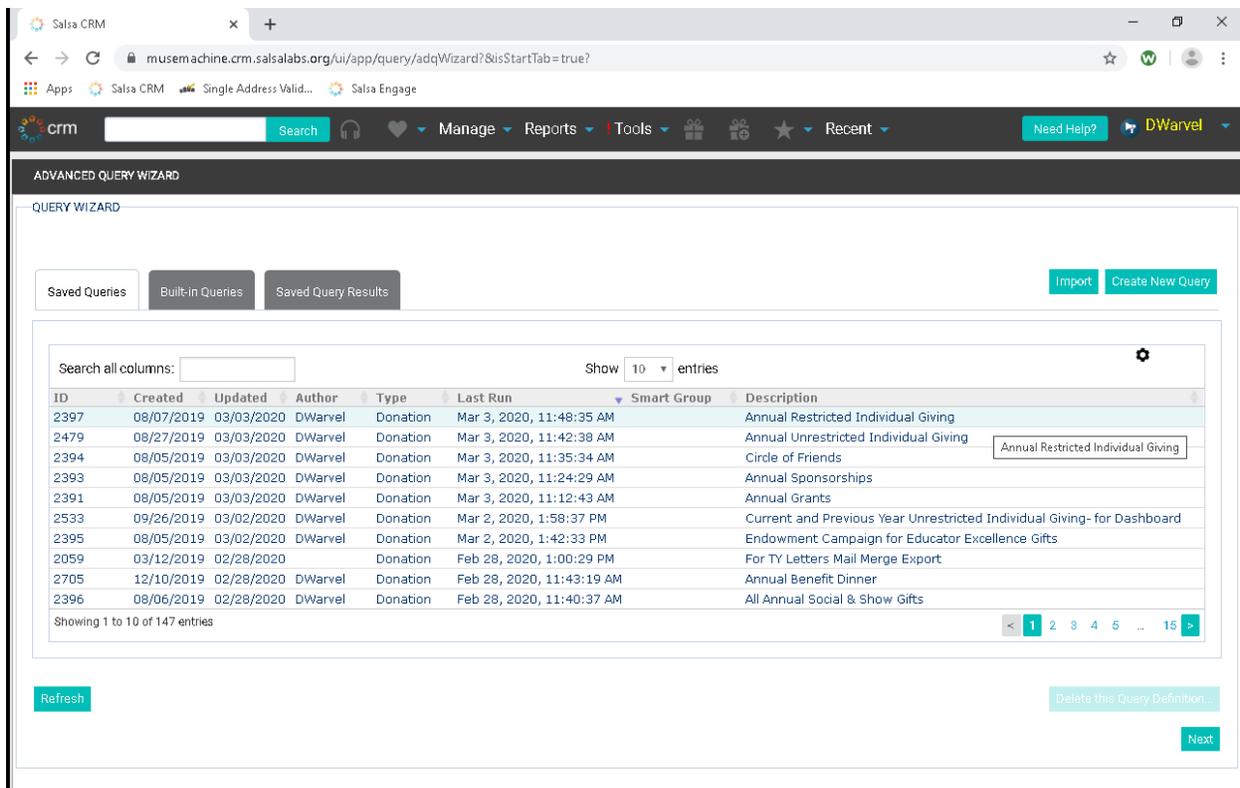
The screenshot shows the Salsa CRM interface with the Advanced Query Wizard open. The wizard is at Step 3: Preview, Exclude, and Modify Data. A table displays the results of the query, with columns for List As Name, Last or Org Name, First Name, Campaign Name, Fund Name, Appeal Name, and another Fund Name. The table contains 20 rows of donation data. At the bottom of the wizard, there are buttons for 'Convert to Spreadsheet', 'Restart Wizard', 'Back', 'Next', and 'Finish'.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name
<input checked="" type="checkbox"/> Patti Giering	Giering	Patricia	2019-2020 Annual	Unrestricted		Unsolicited
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Barbara Kryter Ackerman Fund	Barbara Kryter Ackerman Fund		2019-2020 Annual	Unrestricted		Unsolicited
<input checked="" type="checkbox"/> Robert & Jean Beecher	Beecher	Jean	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Rose Fox	Fox	Rose	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Elizabeth Stryker	Stryker	Elizabeth	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Robert & Jean Beecher	Beecher	Jean	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Mary Campbell Zopf	Campbell Zopf	Mary	2019-2020 Annual	Unrestricted		In Memory Of
<input checked="" type="checkbox"/> Drs. Margaret Dunn & William Spohn	Spohn	William	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Lawrence J. Litscher	Litscher	Lawrence	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> Tom & Cindy Clark	Clark	Thomas	2019-2020 Annual	Unrestricted		2019 MM41819 A

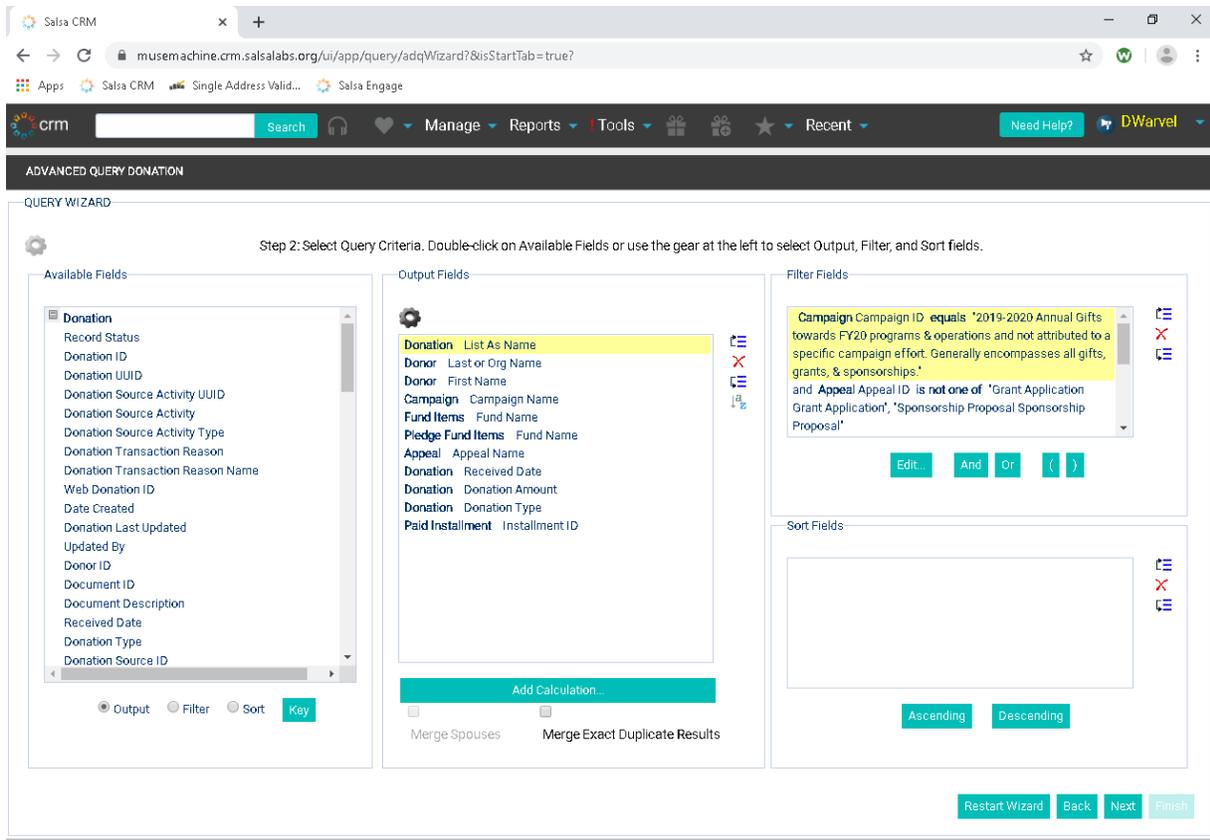
- The raw data that comes out of Salsa will need to be manipulated.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment or Recurring Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot tables
- Ensure that the color coding is applied appropriately, and the Summary data table total matches the pivot table total.
- **Dev- Restricted** tab contains all information for current fiscal year individual gifts restricted to a particular program area.
 - Run the Salsa Advanced Query *Annual Restricted Individual Giving*
 - Go to Reports→Queries→Advanced Query Wizard



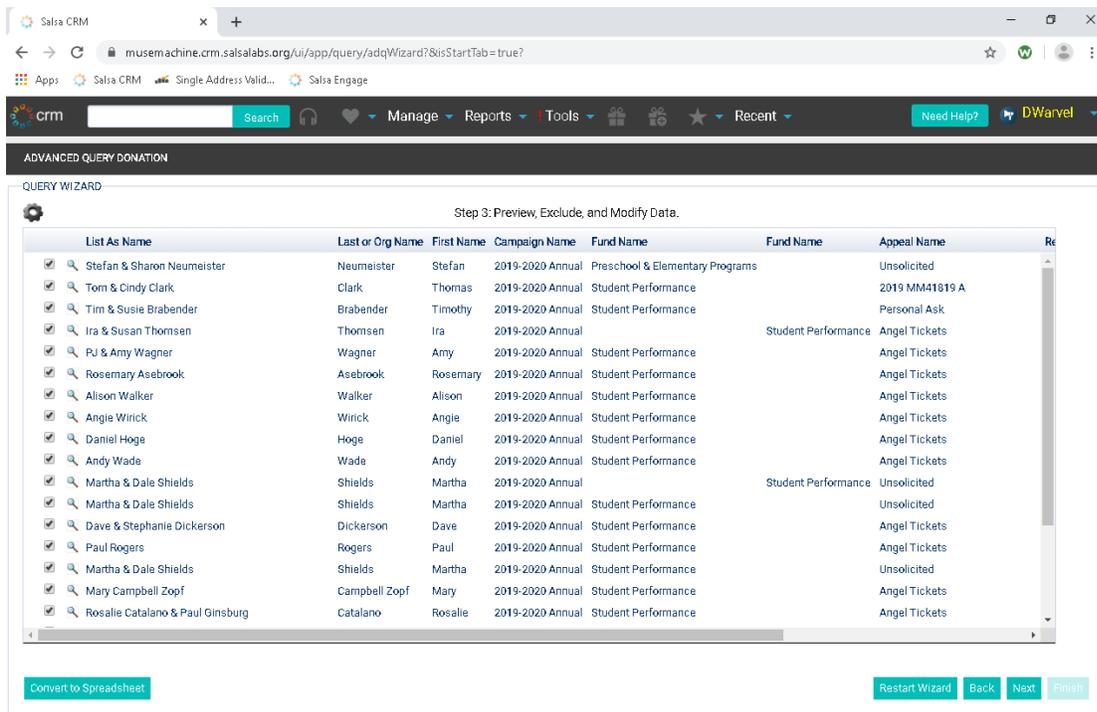
- Choose the *Annual Restricted Individual Giving* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

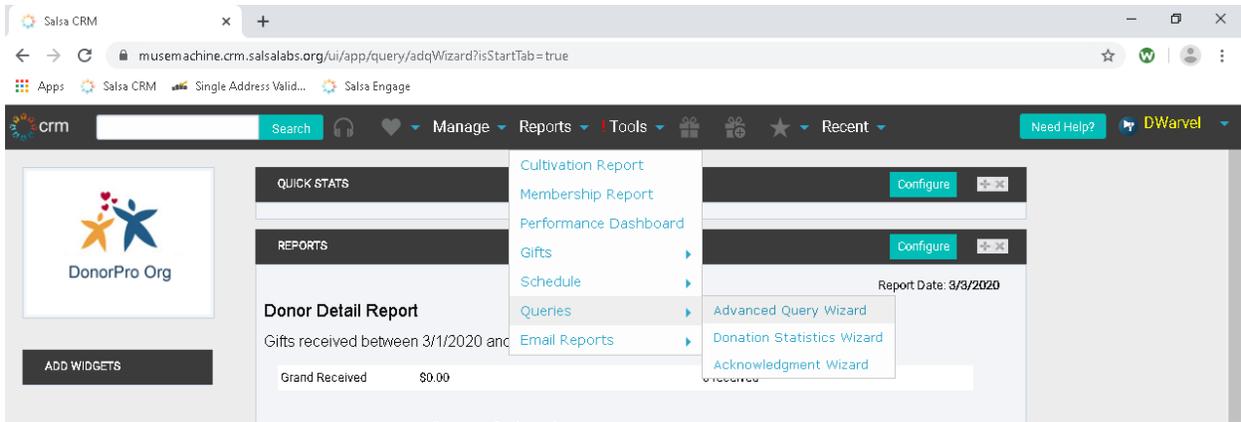


- Click Next
- After the results have populated, click Convert to Spreadsheet

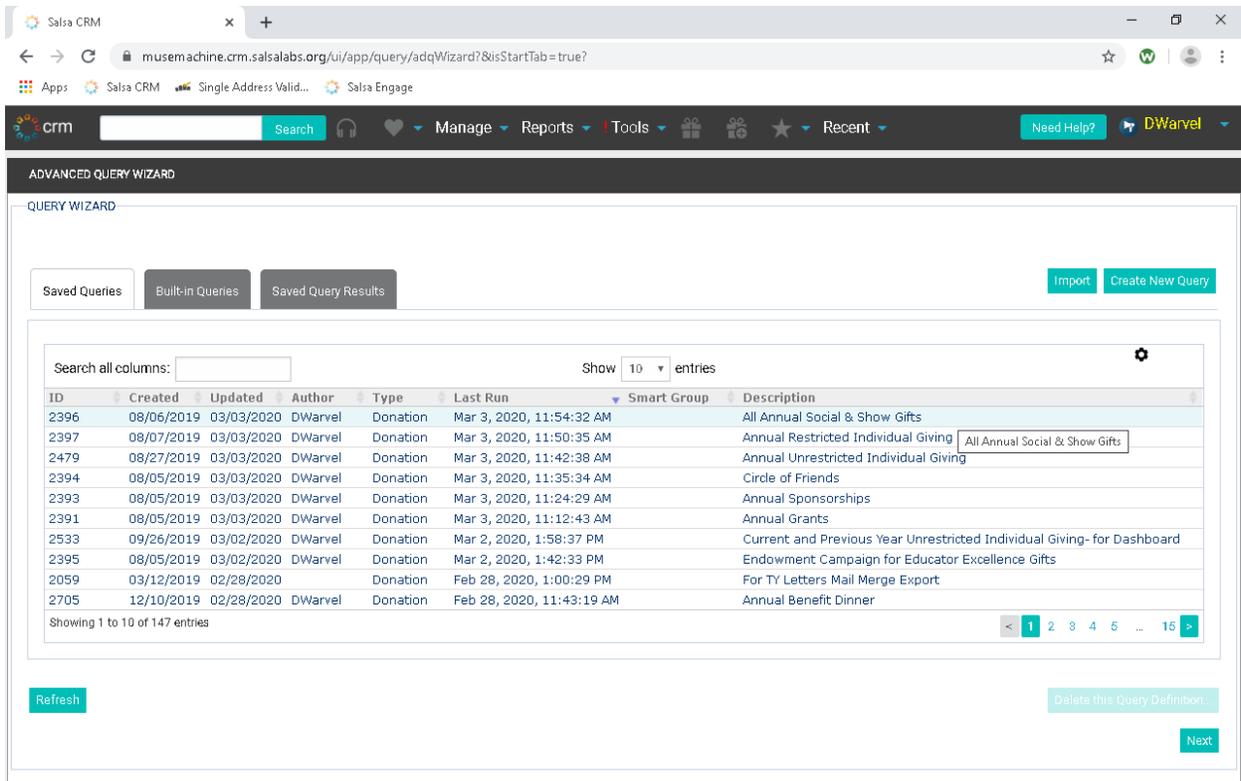


- The raw data that comes out of Salsa will need to be manipulated.
 - Move data in Fund Name2 into the Fund Name column.

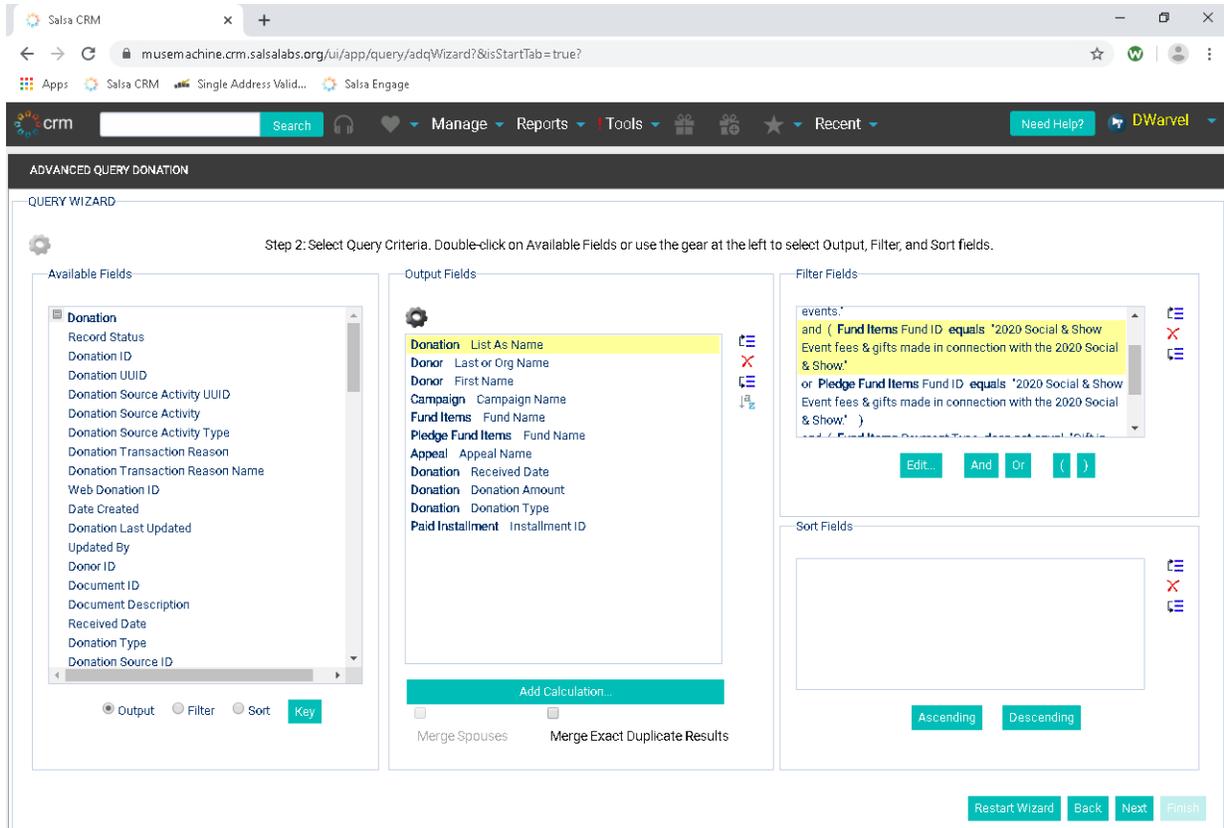
- In the Donation Amount Column *Convert to Number*
- If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
 - Copy the data and paste into the table in the Scorecard, replacing the former data.
 - Refresh both pivot tables.
- **Dev- Social & Show** tab contains all information for current fiscal year Social & Show gifts and event fees.
 - Run the Salsa Advanced Query *All Annual Social & Show Gifts*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *All Annual Social & Show Gifts* query



- Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.

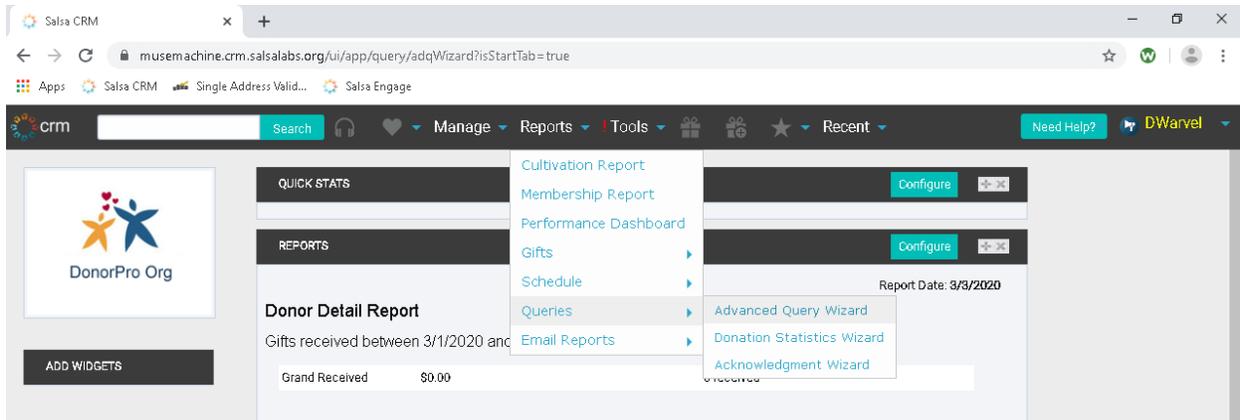


- Click Next
- After the results have populated, click Convert to Spreadsheet

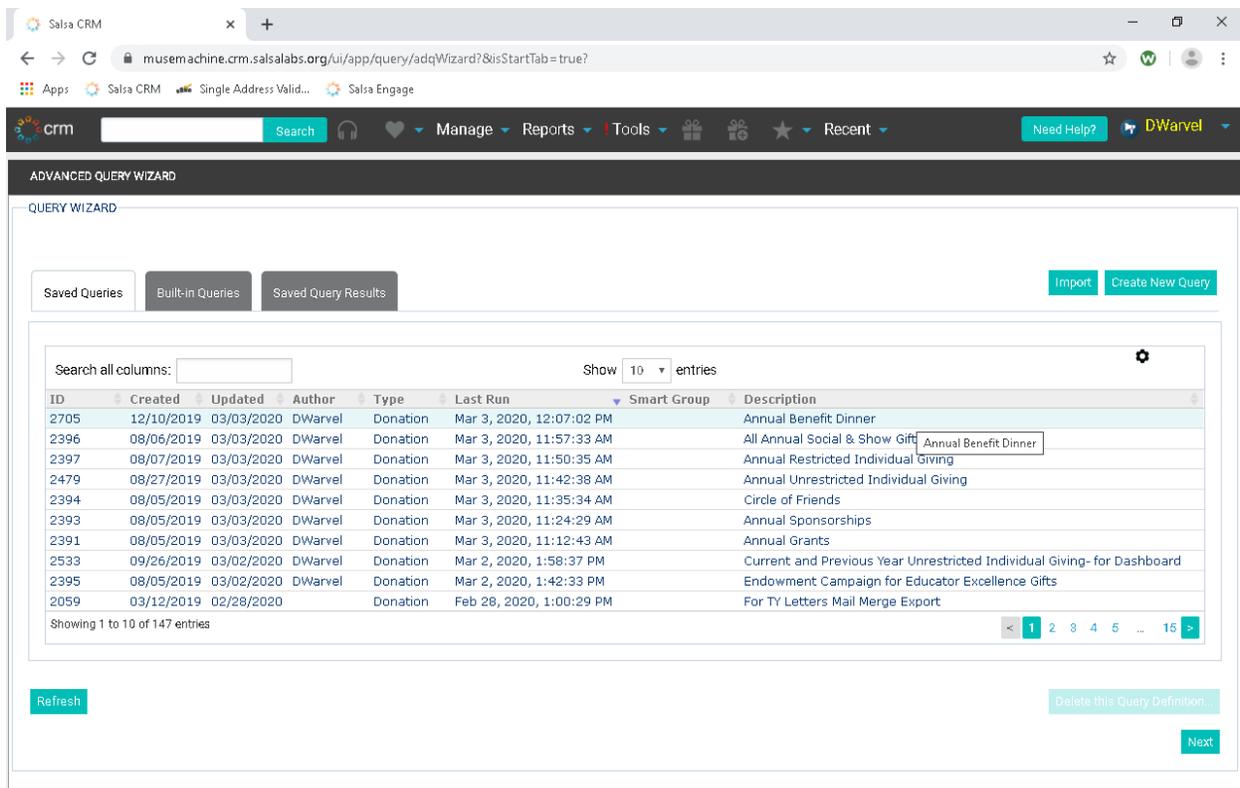
The screenshot shows the Salsa CRM Advanced Query Wizard interface. The browser address bar indicates the URL: `musemachine.crm.salsalabs.org/ui/app/query/adqWizard?&isStartTab=true?`. The page title is "ADVANCED QUERY DONATION". The wizard is in "Step 3: Preview, Exclude, and Modify Data." The main content is a table with the following columns: List As Name, Last or Org Name, First Name, Campaign Name, Fund Name, Fund Name, and Appeal Name. The table contains 20 rows of data, each with a checkbox in the first column. At the bottom of the table, there are buttons for "Convert to Spreadsheet", "Restart Wizard", "Back", "Next", and "Finish".

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name
<input checked="" type="checkbox"/> King Orthodontics	King	Samuel	Special Events	2020 Social & Show		Social Sponsor- GOL
<input checked="" type="checkbox"/> Kadie & Bob Crawford	Crawford	Katherine	Special Events	2020 Social & Show		Social Sponsor- GOL
<input checked="" type="checkbox"/> Adam & Andi Hickman	Crawford	Katherine	Special Events	2020 Social & Show		Social Sponsor- BRO
<input checked="" type="checkbox"/> Jeremy & Megan Fanning	Crawford	Katherine	Special Events	2020 Social & Show		Social Sponsor- BRO
<input checked="" type="checkbox"/> Doug & Sharon Scholz	Scholz	Douglas	Special Events	2020 Social & Show	2020 Social & Show	Social Sponsor- GOL
<input checked="" type="checkbox"/> Mary Hutcheson	Hutcheson	Mary	Special Events	2020 Social & Show		Social & Show
<input checked="" type="checkbox"/> Mary Hutcheson	Hutcheson	Mary	Special Events	2020 Social & Show		Social & Show
<input checked="" type="checkbox"/> Laurie Westheimer, Realtor, Coldwell Banker Heritage	Westheimer	Laurie	Special Events	2020 Social & Show		Social Sponsor- BRO
<input checked="" type="checkbox"/> Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show		Social Gift
<input checked="" type="checkbox"/> Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show		Social & Show
<input checked="" type="checkbox"/> Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show		Social & Show
<input checked="" type="checkbox"/> Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show		Social & Show
<input checked="" type="checkbox"/> The Polar Group	Crawford	Katherine	Special Events	2020 Social & Show		Social Sponsor- SILV
<input checked="" type="checkbox"/> Irongate Inc., Realtors	Irongate Inc., Realtors		Special Events	2020 Social & Show		Social Sponsor- BRO
<input checked="" type="checkbox"/> Doug & Sharon Scholz	Scholz	Douglas	Special Events	2020 Social & Show		Social Sponsor- GOL
<input checked="" type="checkbox"/> Ira & Susan Thomsen	Thomsen	Ira	Special Events		2020 Social & Show	Social Sponsor- SILV
<input checked="" type="checkbox"/> Eubel Brady & Suttman Asset Management	Eubel Brady & Suttman Asset Management		Special Events		2020 Social & Show	Social Sponsor- BRO

- The raw data that comes out of Salsa will need to be manipulated.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.
- **Dev- Benefit Dinner** tab contains all information for current fiscal year Social & Show gifts and event fees.
 - Run the Salsa Advanced Query *Annual Benefit Dinner*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Benefit Dinner* query



- Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields:

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Fields:

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID

Filter Fields:

Benefit Dinner, Social & Show, & other small community events.
 and (Fund Items Fund ID equals *2020 Benefit Dinner Event fees & gifts made in connection with the 2020 Benefit Dinner.
 or Pledge Fund Items Fund ID equals *2020 Benefit Dinner Event fees & gifts made in connection with the 2020 Benefit Dinner.

Sort Fields:

Ascending Descending

Buttons: Edit, And, Or, (), Restart Wizard, Back, Next, Finish

- Click Next
- After the results have populated, click Convert to Spreadsheet

Step 3: Preview, Exclude, and Modify Data.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		Special Events	2020 Benefit Dinner		BD Table
<input checked="" type="checkbox"/> Suzanne Patterson	Patterson	Suzanne	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Anonymous	Kunesh	Sarah	Special Events	2020 Benefit Dinner		BD Gold Tkt
<input checked="" type="checkbox"/> ACCO Brands	ACCO Brands		Special Events		2020 Benefit Dinner	BD Sponsor
<input checked="" type="checkbox"/> Dr. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Dr. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Bill & Sonnie Kasch	Kasch	Sonnie	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Anonymous	Campbell Zopf	Mary	Special Events	2020 Benefit Dinner		BD Sponsor
<input checked="" type="checkbox"/> Pam Houk	Houk	Pam	Special Events	2020 Benefit Dinner		BD Gold Tkt
<input checked="" type="checkbox"/> Steven & Paula Reed in Honor of Susan & Bud Zupp	Reed	Steven	Special Events	2020 Benefit Dinner		BD Gift
<input checked="" type="checkbox"/> Doug & Ann Almoney	Almoney	Anne	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Mark & Marilyn Dues	Dues	Marilyn	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Meagan Geeting in Honor of Bud & Susan Zupp	Geeting	Meagan	Special Events	2020 Benefit Dinner		BD Gift
<input checked="" type="checkbox"/> Virginia & Edman Gray	Gray	Edman	Special Events	2020 Benefit Dinner		BD Gold Tkt
<input checked="" type="checkbox"/> Julia D. Hobart	Hobart	Julia	Special Events	2020 Benefit Dinner		BD Gold Tkt
<input checked="" type="checkbox"/> Darren McGarvey & Darrell Bickley	McGarvey	Darren	Special Events	2020 Benefit Dinner		BD Silver Tkt
<input checked="" type="checkbox"/> Thom & Penni Meyer	Meyer	Thomas	Special Events	2020 Benefit Dinner		BD Platinum Tk

Buttons: Convert to Spreadsheet, Restart Wizard, Back, Next, Finish

- The raw data that comes out of Salsa will need to be manipulated.

- In the Donation Amount Column *Convert to Number*
- If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.