Guide to the Entity Overview

Ver. 1.1

2/11/2019

Entity Overview screenshot showing:

Entity Overview — Actions Print

Mr. [redacted] #532188
Rec Type: Parent, Staff — 08/05/1970 (48)
Degree
PM Manager
AAA — Annual Faculty Staff — Northwest Arkansas Chapter
Married to: [redacted] 2 (FP)

Contact Information (50100) — Actions Help

Home (Preferred)
376 McKnight Avenue
West Fork, AR 72774-3144
Modified: 05/09/2017
(479) 312-9560 (H, Pref)

Business
Software Support Specialist
University of Arkansas
UPTE 229
Fayetteville, AR 72701-1201
Modified: 05/10/2017
(479) 575-4135 (B)

[redacted] (Business, Pref)

Google Maps Home   Google Maps Business

Other Active Telephone Info (100503) (0) — Actions Help

Committee Participation (100400) (0) — Actions Help

Prospect Summary (50104) (0) — New Actions Help

Affiliations (50103) (2) — Actions Help

	Affiliation	Status	Record Type	Affil Year
...	Development Only	Active		
...	Advancement Staff	Active		

Primary Credit Giving Summary (100010) — Actions Help

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	140.00	0.00	100.00	0.00	240.00
Total	140.00	0.00	100.00	0.00	240.00

Last Transaction: $10.00 Pledge Payment on Aug 27, 2018

Associated Credit Giving Summary (100011) — Actions Help

Credit	Recog Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	140.00	0.00	100.00	0.00	240.00
Total	140.00	0.00	100.00	0.00	240.00

Contact Report List For Entity (90529) (1/1) — New Actions Help

	Report #	Contact	Purpose	Date	Author
...	155368	Pers Scheduled Visit/Me...	1st Time Cnt	02/11/2019	Mrs. Lizzie M. Johnson

Membership Summary (50102) (1) — Actions Help

Member Since: 2018
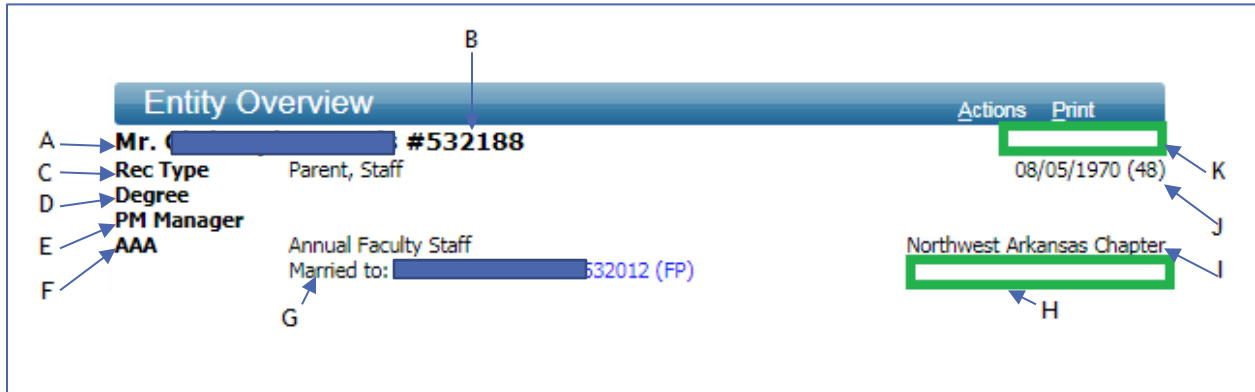Annual Faculty Staff — Start: 06/01/2018 — Expires: 05/31/2019

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Important!

Every Person and Organization in Advance has an Entity ID!

1. THE ENTITY OVERVIEW BLOCK

A. This is the Entity's Primary Name.

   a. There are other types of Entity Names (Here are some of the most used:)

   - Primary
   - Complete
   - Joint Mailing Name (With Spouse or Partner)
   - Nickname
   - Maiden
   - Past Name
   - Formal Name
   - Formal Joint Mailing Name

B. This is the Entity's Entity ID (you will also hear this called an Advance ID.)

   a. The Entity ID remains the same no matter how you change the Entity's name. ▮▮▮▮▮ could, for example, become Bucky Anderson, if I changed my name or used a pseudonym. My number would still be 532188.

C. Rec Type – Entity's can be multiple types of Records. They can be:

   a. Corporate Foundation

   b. Government Organization

   c. Friend (Did not attend the U of A)

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- d. Alumni (Graduated U of A) HIGHEST IN THE HIERARCHY
- e. Alumni No-degree (Attended U of A but didn't graduate)
- f. Corporation
- g. Estates
- h. Faculty
- i. Family Foundation
- j. Foundations
- k. Former Faculty
- l. Former Parent
- m. Former Staff
- n. Former Student (Less than 12 Hours)
- o. Matching Gift Comp
- p. Other Organizations
- q. Parent
- r. Staff
- s. Student (Current Student)
- t. Trade Organization
- u. Trust

D. Degree – Typically this means a degree with the University of Arkansas. Though I have a degree, I do not yet have a degree with the U of A, so this field is blank.

E. PM Manager – This is the Prospect Manager Manager. Entity's may also be Prospects. If an Entity is a Prospect (Covered Later), they will have a PM Manager. If I was a prospect, there would be a name in this space. It would be the Director of Development or Prospect Manager highest in the organization that was assigned to me.

F. AAA – Arkansas Alumni Association. This gives you the entity's status with the Alumni Association. In this case, I am an Annual Faculty Staff member.

G. Relationship field – On my sheet it shows that I am married to ▮▮▮▮▮▮▮s. I could also be Partnered with someone. Advance offers both options.

    a. Note that ▮▮▮▮▮▮▮ #532012 (FP) is hyperlinked. Clicking on her name will take you to her record.

    b. Also note, that Advance gives you her Record Type. (FP) is Former Parent.

H. The Awards Field – In this location, blank on my sheet you might find any special honors or awards that have been conferred on the entity by the University. (e.g. Towers Old Main Accepted (Ruby)) Typically these awards will go with a VIP status. More to come on VIPs.

I. The Chapter Field – This field shows the members Alumni Association chapter (assuming that they are a member.)

J. Birthdate and Age

K. The VIP Block – This area is reserved for the VIP designation.

    a. If this block has VIP in it. DO NOT MAKE ANY CHANGES TO THIS RECORD. SEND ALL CHANGE REQUESTS TO records@uark.edu.

    b. Very Important Person designation is reserved for those who are Towers of Old Main, Chancellors, Former Chancellors, etc.

    c. All changes to VIP records are done by the Director of the Records Team.

2. THE CONTACT INFORMATION BLOCK

A. Home (Preferred) – This is the preferred home address of the entity.

  a. Preferred is IMPORTANT.

  b. Entities can have more than one active address. Primary home, Business, summer home, etc.

  c. Entities can only have ONE preferred address.

  d. Preferred addresses are where they want to receive their mail.

B. Modified – The last time this address information was updated.

C. Phone Number – This is the entity's phone number.

  a. LOOK FOR Pref. (H, Pref)

  b. Just like addresses, entity's can have multiple phone numbers.

  c. Only ONE phone number can be preferred.

D. The personal email block. This record does not have a personal email on it.

  a. LOOK FOR Pref. (H, Pref)

  b. Just like addresses, entity's can have multiple emails.

  c. Only ONE email can be preferred.

E. Business – Entity's business address

  a. In this example the Business address is NOT the Preferred address.

       b. Entity's can only have ONE preferred address.

F. Modified – The last time this address information was updated.

G. Business Phone Number – This is the entity's business phone number.

       a. LOOK FOR Pref. (H, Pref)

       b. Just like addresses, entity's can have multiple phone numbers.

       c. Only ONE phone number can be preferred (It can be the business number.)

H. The business email block.

       a. LOOK FOR Pref. (Business, Pref)

       b. Just like addresses, entity's can have multiple emails.

       c. Only ONE email can be preferred.

3. OTHER ACTIVE TELEPHONE INFO

Other Active Telephone Info (100503) (0)	Actions Help ⊗

A. This block contains any other phone numbers that an entity has plus the type of phone number.

   a. The types of phone numbers are:

- Home
- Business
- Home Extra
- Business Extra
- Cell Phone
- Parent
- Seasonal
- Relation
- Vacation
- Trustee
- Home Fax
- Business Fax
- Spouse's Business Telephone
- Past Home
- Past Business
- Past Business Fax
- Past Home Fax

4. COMMITTEE PARTICIPATION (TAKEN FROM A DIFFERENT RECORD AS A BETTER EXAMPLE)

A. Committee – Any University of Arkansas committee in which the entity takes part.
B. Status – The entity's status with the committee.
   a. Available statuses are:
      • Active
      • Inactive
      • Declined
C. Role – The role that the entity plays on the committee.
   a. Available roles are:
      • Chair
      • Co-Chair
      • Honorary Chair
      • Member
      • Staff Liaison
D. Start – Date entity began committee role.
E. Stop – Date entity stopped committee role.

Important!

Not Everyone has a Prospect ID!

5. **THE PROSPECT SUMMARY BLOCK (TAKEN FROM A DIFFERENT RECORD AS A B___ER EXAMPLE)**

   a. IMPORTANT. If there is information under the Prospect Summary bar then the Entity has a Prospect ID as well.

   b. Everyone and every organization has an Entity ID, not all Entity's have a Prospect ID.

   c. In order to get a Prospect ID, an Entity must meet two rules. They must:

      1.   Be willing and

      2.   Be capable of donating $25,000 to the University right now.

A. Name - The name of the prospect has been removed in this example.

B. Type – Prospect IDs can be assigned to more than one entity.

   a. In other words, every entity has a unique Entity ID, but multiple Entities can share a single Prospect ID.

   b. In this case, this is a Group type Prospect which means that it represents multiple entities.

C. Stage – Active Cultivation means that we are working with the Prospects on their giving interests.

D. Trans GR – This is the amount that Wealth Engine (an outside company) believes that the Prospect is capable of donating.)

E. Current Prospect – Active – This tells you that the Prospect is still Actively giving to the University of Arkansas or will be soon.
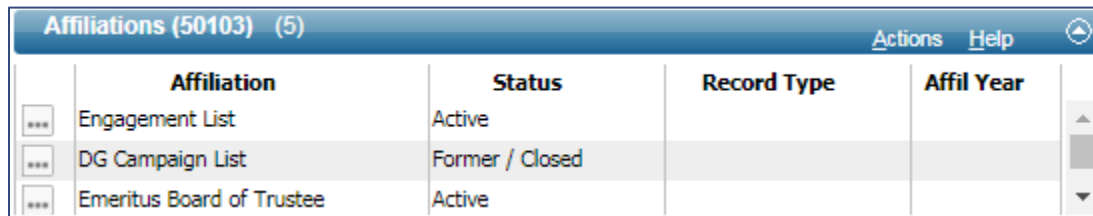
F. Start Date – The date that this Prospect ID was created.

G. Stop Date – The date that this Prospect ID is closed out.

6. AFFILIATIONS (TAKEN FROM A DIFFERENT RECORD AS A BETTER EXAMPLE)

Affiliations (50103) (5)			Actions Help
Affiliation	**Status**	**Record Type**	**Affil Year**
Engagement List	Active		
DG Campaign List	Former / Closed		
Emeritus Board of Trustee	Active		

A. These are the affiliations that the Entity has with the University of Arkansas.

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1. **PRIMARY CREDIT GIVING SUMMARY(TAKEN FROM A DIFFERENT RECORD AS A BETTER EXAMPLE)**
   a. **THIS IS THE ENTITY'S OWN MONEY GIFTS.**

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	17,572.00	0.00	0.00	0.00	17,572.00
By Unit	3,467,311.07	6,609,357.52	0.00	1,394,367.59	11,471,036.18
Total	3,484,883.07	6,609,357.52	0.00	1,394,367.59	**11,488,608.18**

Primary Credit Giving Summary (100010)   Actions   Help

Last Transaction: $25.00 Outright Gift on Jul 24, 2018

G   A   B   C   D   E   F

A. Credit Column
   a. Annual Fund – Donations to the Chancellor's Annual Fund
   b. By Unit – Individual College Unit giving (e.g. Chemistry, Art, Diversity, etc.)
   c. Total – Sum of Rows Above
B. Hard Credit Gifts – Gifts that the entity can write off on their taxes.
   a. In other words, these are gifts that came out of the entity's pocket.
   b. These are not gifts for an organization that the entity is associated with.
   c. This must be the entity's own money.
C. Deferred Gifts – Planned giving (e.g. Annuities and Trusts)
D. Outstanding Pledges – Various promises to donate in the future.
E. Outstanding Bequests – Typically donations from life insurance or the results of a will.
F. Total – Total of all columns to the left.
G. Last Transaction – Last giving transaction of the entity.

7. ASSOCIATED CREDIT GIVING SUMMARY (TAKEN FROM A DIFFERENT RECORD AS A BETTER EXAMPLE)

b. THIS IS GIVING THAT THE ENTITY IS ASSOCIATED WITH. THIS IS BOTH THE MONEY THAT THEY GAVE DIRECTLY AND THE MONEY THAT WAS GIVEN BY OTHERS THAT THEY ARE ASSOCIATED WITH (I.E. SPOUSE, CORPORATION, ETC.)

Associated Credit Giving Summary (100011)   Actions Help

Credit	Recog Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	17,572.00	70,000.00	0.00	0.00	87,572.00
By Unit	3,529,986.07	6,998,357.52	0.00	1,394,367.59	11,922,711.18
Total	3,547,558.07	7,068,357.52	0.00	1,394,367.59	**12,010,283.18**
A	B	C	D	E	F

A. Credit Column
   a. Annual Fund – Donations to the Chancellor's Annual Fund
   b. By Unit – Individual College Unit giving (e.g. Chemistry, Art, Diversity, etc.)
   c. Total – Sum of Rows Above
B. Recog Credit Gifts
   a. These are gifts that came out of the entity's pocket and gifts that came from areas that they are associated with. In this case it is the spouse.
   b. Associated Credit Giving Summary includes the dollars seen in the Primary Credit box.
   c. In other words, Associated Credit Giving Summary will always be equal to or larger than the Primary Credit Giving Summary because it includes the Primary Credit Giving Summary.
C. Deferred Gifts – Planned giving (e.g. Annuities and Trusts)
D. Outstanding Pledges – Various promises to donate in the future.
E. Outstanding Bequests – Typically donations from life insurance or the results of a will.
F. Total – Total of all columns to the left.

8. **CONTACT REPORT LIST FOR ENTITY (TAKEN FROM A DIFFERENT RECORD AS A BETTER EXAMPLE)**

   a. Contact Reports are used to track the University's communications with its Prospects.

   b. Typically these are done by Directors of Development but may be done by other staff members, such as:

      - Deans
      - Vice Chancellors
      - Annual Fund
      - Alumni Association
      - Donor Relations

A. Ellipses – The ellipses is used to open the Contact Report for a detailed view.

B. Report # - This is an automatically generated number assigned to the Contact Report.

C. Contact – This is the type of contact. Here are the types:

   - Attempted Contact
   - Pers Scheduled Visit/Meeting (THIS GIVES DIRECTORS OF DEVELOPMENT CREDIT ON THEIR GOALS)
   - Campus Visit/Meeting (THIS GIVES DIRECTORS OF DEVELOPMENT CREDIT ON THEIR GOALS)
   - Campaign/Board Meeting

- Events
- Phone Call
- Email
- Letter
- Stewardship Reports
- Token of Appreciation
- Pers Unscheduled Visit/Meeting
- Chat/IM
- Facebook
- Twitter
- LinkedIn
- Information

D. Purpose – This the purpose of the contact. The options are:
- Appreciation
- 1st Time Cnt (Can only be used if this entity has never had a Contact Report.)
- Outside Inquiry
- Solicitation Accepted (USED BY DODS TO TRACK PROPOSALS)
- Solicitation Ask (USED BY DODS TO TRACK PROPOSALS)
- Solictitation Declined (USED BY DODS TO TRACK PROPOSALS)
- Sponsorship
- Stewardship
- Cultivation
- Alumni Relations
- Memberships
- Records
- Volunteer Act
- Programs

E. Date – Date of the contact.

F. Author – The person who made the contact.

9. Membership Summary

   a. This is the Alumni Association membership information for the Entity.

A. Member Since: - Year the member joined the Alumni Association.

B. Type of Membership

- Annual

- Life

- Student

- Staff

- Etc.

C. Start Date of Membership

D. Date Membership Expires