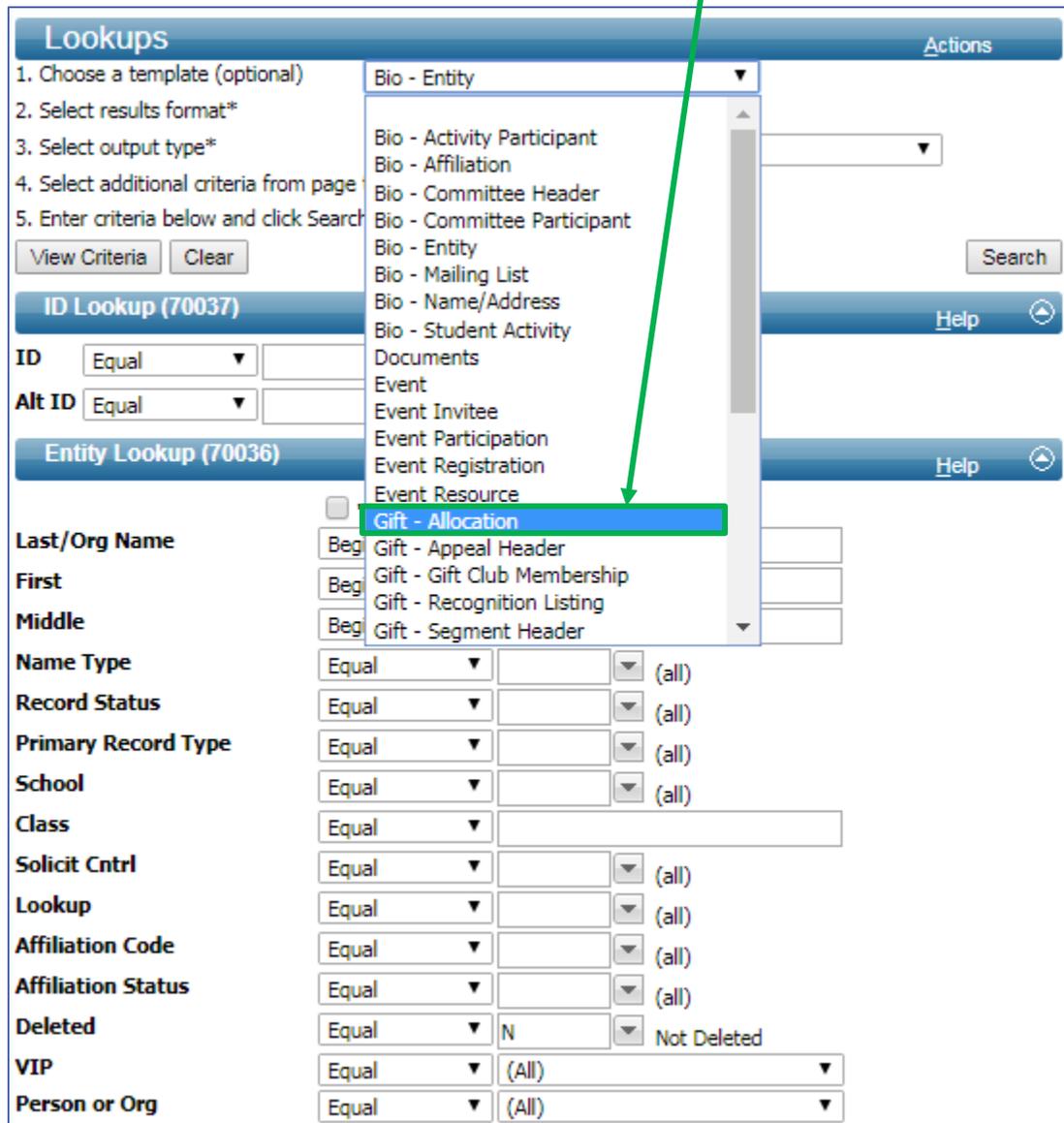


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1. Log in to Advance.
2. Use the **Lookup tool**  for find the **Allocation** in question.
3. Change the **Choose a template (optional)** to **Gift - Allocation**.



The screenshot shows the 'Lookups' interface with a dropdown menu open. The dropdown menu lists various templates, and 'Gift - Allocation' is highlighted in blue. A green arrow points from the text 'Gift - Allocation' in the instructions to the selected item in the dropdown.

Field	Value
1. Choose a template (optional)	Bio - Entity
2. Select results format*	
3. Select output type*	
4. Select additional criteria from page	
5. Enter criteria below and click Search	
View Criteria	Clear
ID Lookup (70037)	
ID	Equal
Alt ID	Equal
Entity Lookup (70036)	
Last/Org Name	Beg
First	Beg
Middle	Beg
Name Type	Equal
Record Status	Equal
Primary Record Type	Equal
School	Equal
Class	Equal
Solicit Cntrl	Equal
Lookup	Equal
Affiliation Code	Equal
Affiliation Status	Equal
Deleted	Equal
VIP	Equal
Person or Org	Equal

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- Use the **Allocation Lookup** form's fields to find the allocation you are looking for (See **How to - Lookup Allocations**.) I will use the allocation number 30009621 to go directly to the allocation that I want to add an **Alert** to.
- Enter **Allocation number**. Click **Search** .

The screenshot shows the 'Lookups' interface. At the top, there are five numbered instructions: 1. Choose a template (optional) - Gift - Allocation; 2. Select results format* - Allocation Lookup List; 3. Select output type* - Display results; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. Below these are 'View Criteria' and 'Clear' buttons, and a 'Search' button. The main section is titled 'Allocation Lookup (70040)' and contains a list of fields with dropdown menus and input boxes. The 'Allocation' field is highlighted with a green box and has the value '30009621' entered. A green arrow points from the 'Search' button in the instructions to the 'Search' button in the form. Another green arrow points from the 'Allocation number' text in the instructions to the 'Allocation' input field.

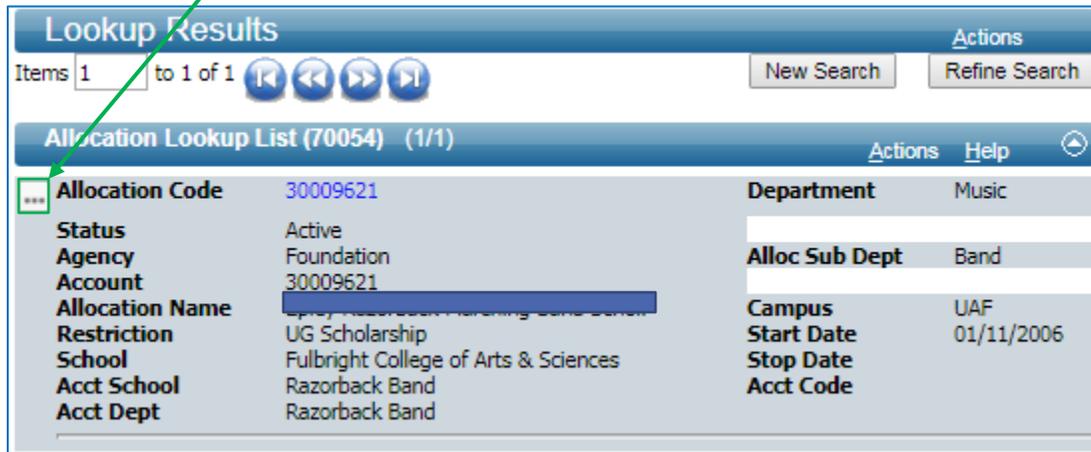
Field	Operator	Value	Additional
Allocation	Equal	30009621	
Status	Equal	A	Active
Account	Equal		
ISIS ItemType	Equal		
Short Name	Contains		
Long Name	Contains		
CFAE Purpose	Equal		(all)
Restriction	Equal		(all)
Department	Equal		(all)
Sub Dept	Equal		(all)
School	Equal		(all)
Campus	Equal		(all)
Agency	Equal		(all)
User Group	Equal		(all)
Acct School	Equal		(all)
Acct Dept	Equal		(all)
Acct Code	Equal	(All)	

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6. Click the ellipses  on the Lookup Results page.



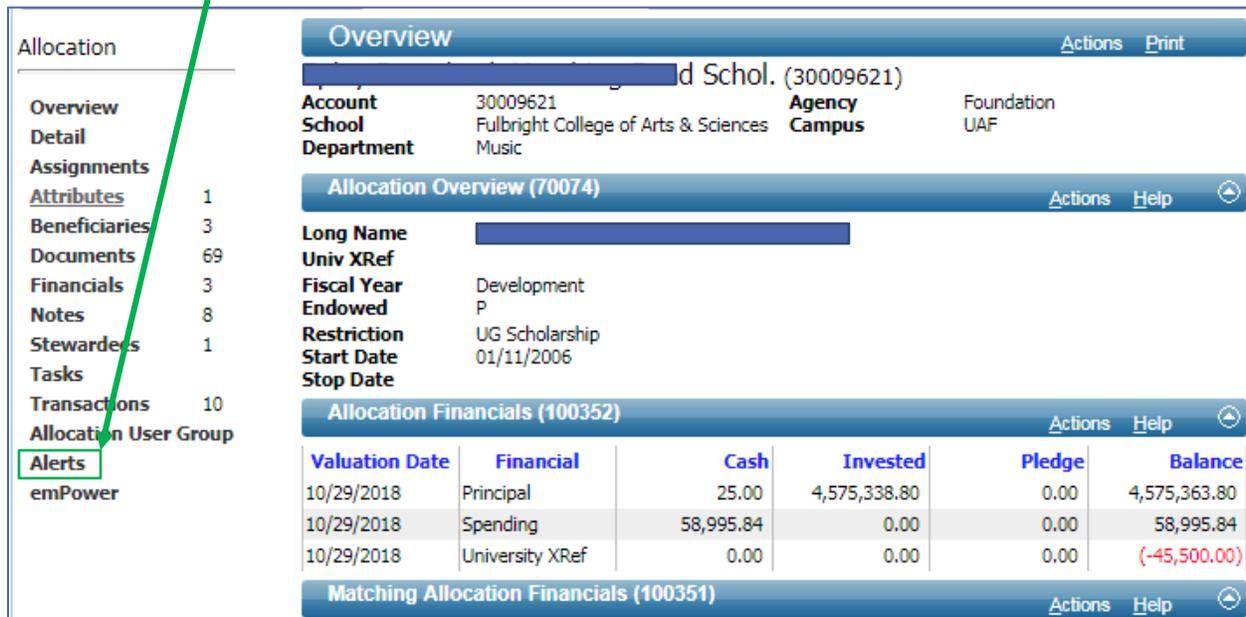
Lookup Results Actions

Items 1 to 1 of 1 New Search Refine Search

Allocation Lookup List (70054) (1/1) Actions Help

Allocation Code	30009621	Department	Music
Status	Active	Alloc Sub Dept	Band
Agency	Foundation	Campus	UAF
Account	30009621	Start Date	01/11/2006
Allocation Name	[REDACTED]	Stop Date	
Restriction	UG Scholarship	Acct Code	
School	Fulbright College of Arts & Sciences		
Acct School	Razorback Band		
Acct Dept	Razorback Band		

7. Click Alerts from the Nav Tree.



Allocation Overview Actions Print

[REDACTED] d Schol. (30009621)

Account	30009621	Agency	Foundation
School	Fulbright College of Arts & Sciences	Campus	UAF
Department	Music		

Allocation Overview (70074) Actions Help

Long Name [REDACTED]

Univ XRef	
Fiscal Year	Development
Endowed	P
Restriction	UG Scholarship
Start Date	01/11/2006
Stop Date	

Allocation Financials (100352) Actions Help

Valuation Date	Financial	Cash	Invested	Pledge	Balance
10/29/2018	Principal	25.00	4,575,338.80	0.00	4,575,363.80
10/29/2018	Spending	58,995.84	0.00	0.00	58,995.84
10/29/2018	University XRef	0.00	0.00	0.00	(-45,500.00)

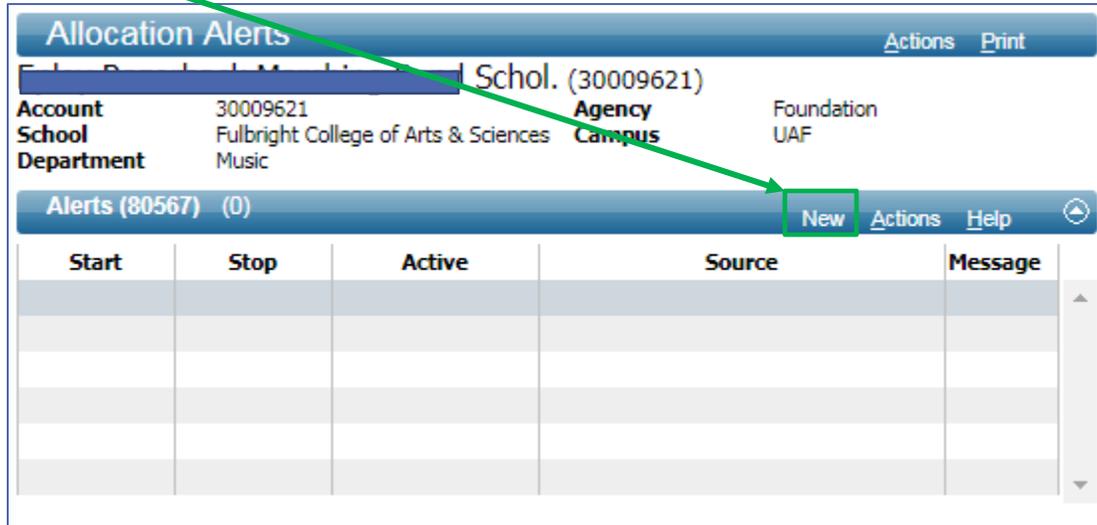
Matching Allocation Financials (100351) Actions Help

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8. Click **New** from the Allocation Alerts page.



The screenshot shows the 'Allocation Alerts' interface. At the top, there is a header bar with 'Allocation Alerts' on the left and 'Actions' and 'Print' on the right. Below this, there is a section for account information: 'Account 30009621', 'School Fulbright College of Arts & Sciences', 'Department Music', 'Agency Foundation', and 'Campus UAF'. Below the account information is a sub-header for 'Alerts (80567) (0)' with a 'New' button highlighted in a green box. To the right of the 'New' button are 'Actions' and 'Help' links. Below the sub-header is a table with the following columns: 'Start', 'Stop', 'Active', 'Source', and 'Message'. The table is currently empty.

9. Fill out the Allocation Alerts page.

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Allocation Alerts

Actions Print

Account 30009621 (30009621) Agency Foundation
School Fulbright College of Arts & Sciences Campus UAF
Department Music

Alerts (80567) (1/1)

Save Actions Help

Start	Stop	Active	Source	Message
		Active		

From ID 532188 A Mr. [Redacted] Active

Allocation 30009621 B [Redacted]

Unit UDE C University Development

Start D [Calendar Icon]

Stop E [Calendar Icon]

Reason F

Message* G

Comment H

- From ID** - Autopopulates. This is the person setting the Alert. In this case: Me.
- Allocation** - Autopopulates. This is the allocation that I am setting the alert on.
- Unit** - Autopopulates. This is the unit setting the alert.
- Start** - Optional. This is the date that the alert should start. It may be today or it may be in the future.
- Stop** - Optional. This is the date when the alert should end. You may not want to set this date if the alert is to be permanent.
- Reason** - Optional. Select a reason from the list below:
 - Anonymous**
 - Do Not AF Solicit**
 - Do Not Phone Solicit**

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- Do Not Publish
 - Do Not Report
 - Do Not Send Newsletter
 - Do Not Solicit Memberships
 - Drop from all Mailing
 - Drop from all Towers mailings
 - Drop from Email
 - Include
 - Other drop down options available. Email tiptonj@uark.edu to request new options.
- G. **Message** - Required. This is what you want the alert to say. This should be clear and concise.
- H. **Comment** - Optional. Enter any clarifying comments here. Typically why an alert is being set, the circumstances behind the setting, who directed the alert, who will lift the alert, etc.
- I. **Active** - Check or uncheck to make alert active/inactive.

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10. Your Allocations Alerts page should look like this:

Allocation Alerts Actions Print

(30009621)

Account 30009621 **Agency** Foundation
School Fulbright College of Arts & Sciences **Campus** UAF
Department Music

Alerts (80567) (1/1) Save Actions Help

Start	Stop	Active	Source	Message
		Active		

From ID 532188 Mr. [redacted] **Active**

Allocation 30009621 [redacted]

Unit UDE University Development

Start 03/12/2019

Stop 03/30/2019

Reason

Message* Allocation not taking donations for next 18 days.

Comment I'm doing this as a test.

CLICK **SAVE**.