

# How To Find an Entity's Photo in Advance

Ver. 1.1

2/27/2019

1. Log in to Advance.
2. Click the **Lookups** tool from the **Main Menu**.

**ADVANCE** Clear Local Storage (TMS) | Purge Cache **Chris Farris** [Logout]

Home x

Home

Annual Fund  
Gift & Bio  
Alerts/Messages  
Change Password

**Home** Actions

You are logged on as **Mr. Christopher Farris** on the **ADVTRAIN** database. Welcome to Advance. Today is Tuesday, February 26, 2019.

**Tasks (50402)** Actions Help

Scheduled	Name	Task	Status
10/18/2018	Jr. & Ltd Co.	Solicitation Plan	Cancelled

**Undergraduate Giving Statistics (100516)** Actions Help

Last Fiscal Year	This Fiscal Year
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NOTE 1: Not all Entity's have photos in the system.

NOTE 2: Why do we store the picture? If we are meeting a donor for the first time, it is often nice to be able to identify them on site.

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- Use either the **Lookup** functionality or, if you know it, the **Entity's ID** to go their **Advance** record.
  - In this example, we will use my **Entity ID**.
  - If you need assistance with using the **Lookup** feature, see the other **How to's** on **Lookups**.

The screenshot shows the ADVANCE software interface. At the top, there's a navigation bar with 'Home' and 'Lookups - Bio - Entity'. The main content area is titled 'Lookups' and contains several sections:

- Lookups**: A section with instructions and a 'Search' button. The instructions are: 1. Choose a template (optional) - Bio - Entity; 2. Select results format\* - Entity Lookup List; 3. Select output type\* - Display results; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. There are 'View Criteria' and 'Clear' buttons.
- ID Lookup (70037)**: A section with a 'Search' button and a 'Help' icon. It has two input fields: 'ID' with a dropdown set to 'Equal' and a text box containing '532188'; and 'Alt ID' with a dropdown set to 'Equal' and an empty text box.
- Entity Lookup (70036)**: A section with a 'Help' icon and a 'Sounds Like' checkbox. It has several input fields for various criteria: Last/Org Name, First, Middle, Name Type, Record Status, Primary Record Type, School, Class, Solicit Cntrl, Lookup, Affiliation Code, Affiliation Status, Deleted, VIP, and Person or Org. Each field has a dropdown menu and a text box.

- Click the **Search** button.

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5. Click the ellipses beside my record.

Lookup Results Actions

Items 1 to 1 of 1 New Search Refine Search

Entity Lookup List (50401) (1/1) Actions Help

...	Mr. [REDACTED] 32188 (Parent)	08/05/1970 (48)
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376 McKnight Avenue  
West Fork, AR 72774-3144  
[cmfarris@uark.edu](mailto:cmfarris@uark.edu)

6. From the Entity Overview, click Biographic in the Nav Tree.

ADVANCE Clear Local Storage (TMS) | Purge Cache Chris Farris [Logoff]

Home x Lookup Results x Entity Overview x  
Mr. Christopher Far...

Entity Overview Actions Print

Entity #532188

Rec Type Parent, Staff, More... 08/05/1970 (48)  
Degree  
PM Manager  
AAA Annual Faculty Staff Northwest Arkansas Chapter  
Married to: M [REDACTED] 2012 (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)

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	

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7. From the Nav Tree click **Bio Detail**.

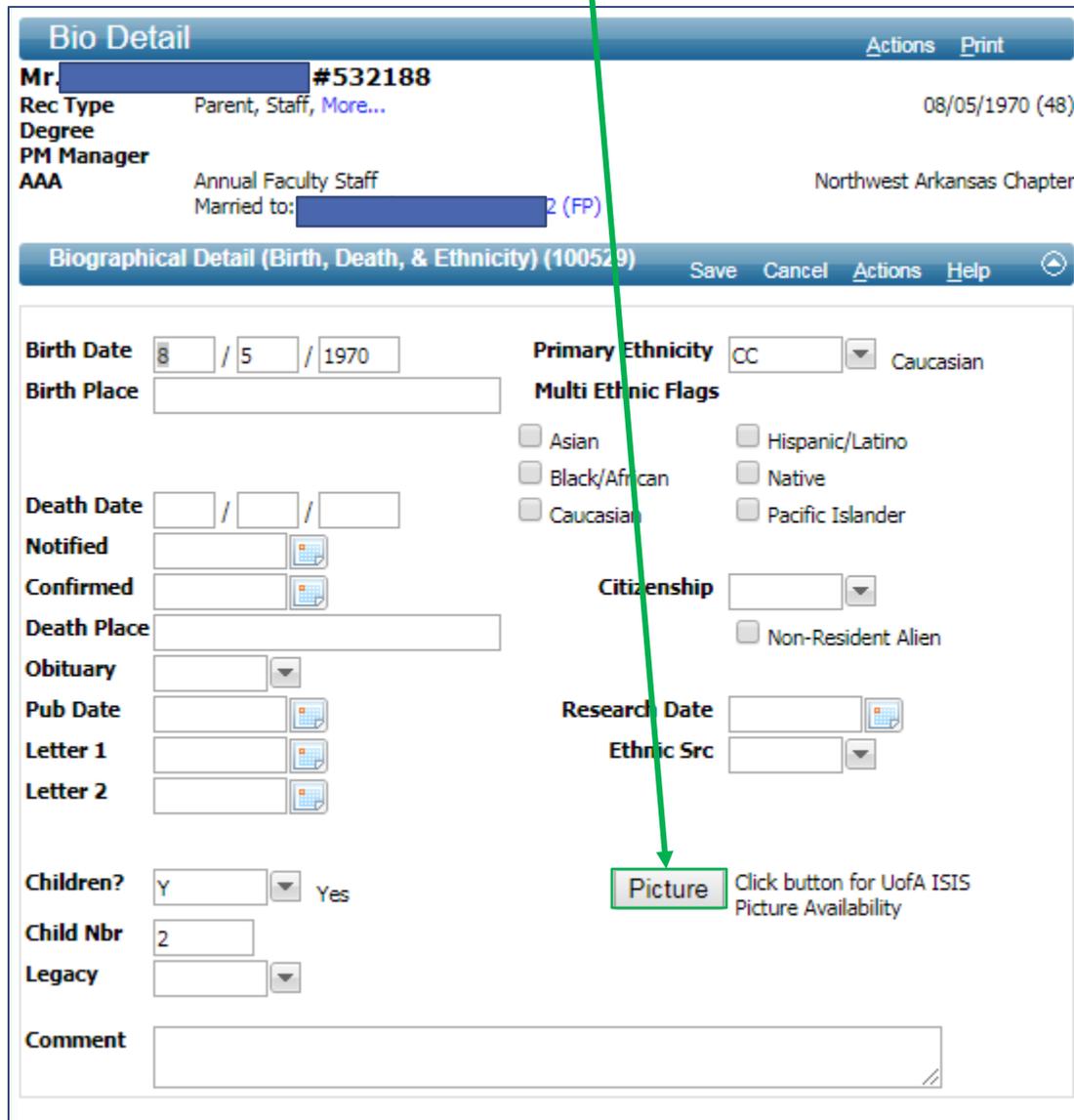
The screenshot shows the ADVANCE software interface. At the top, there is a header with the text "ADVANCE" and "Chris Farris [Logoff]". Below the header, there are several icons and a search bar. The main content area is divided into a left-hand navigation tree and a right-hand main content area. The navigation tree is titled "Entity" and contains several categories: Overview, Detail, Biographic (expanded), Views, Activities, Addresses (4), Affiliations (2), Alloc Beneficiary (2), Awards/Honors, AWC Directory, Bank Card, Bio Detail (1, highlighted with a green box), Child/Gran Child (2), Class Notes, Comments, Committees, Comm Tracking (18), Cvr Accounts, Cvr'd by Accounts, Degrees, Documents (2), and eContact. The main content area displays the "Bio Summary" for an entity with ID #532188. It includes fields for Rec Type (Parent, Staff), Degree, PM Manager (AAA), and Annual Faculty Staff. Below this, there is a "Biographic Detail (50110)" section with fields for Salutation (Mr. Farris), Status (Active), Status Chg Date (08/26/2009), Gender (Male), Children (2), Source Added (ISIS Data, 08/26/2009), and Bio Comment. At the bottom, there is a "Biographical Detail (Birth & Death) (80750)" section with fields for Birth Date (08/05/1970), Birth Place, Ethnicity (Caucasian), Religion, Children (2), and Citizenship. A green arrow points from the "Bio Detail" item in the navigation tree to the "Bio Summary" header in the main content area.

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- From the **Bio Detail** screen. Click the **Picture** button.



**Bio Detail** Actions Print

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

**Biographical Detail (Birth, Death, & Ethnicity) (100529)** Save Cancel Actions Help

**Birth Date** 8 / 5 / 1970  
**Birth Place**

**Death Date**  /  /   
**Notified**    
**Confirmed**    
**Death Place**   
**Obituary**    
**Pub Date**    
**Letter 1**    
**Letter 2**  

**Primary Ethnicity** CC  Caucasian  
**Multi Ethnic Flags**  
 Asian  Hispanic/Latino  
 Black/African  Native  
 Caucasian  Pacific Islander

**Citizenship**    
 Non-Resident Alien

**Research Date**    
**Ethnic Src**  

**Children?** Y  Yes  
**Child Nbr** 2  
**Legacy**  

**Comment**

**Picture** Click button for UofA ISIS Picture Availability

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9. Peruse the picture.

