How To Look Up Allocations

Ver. 1.1

2/6/2019

1. Log in to Advance.

2. Click on the Binoculars (Lookup Tool.)

3. Change Choose a template (optional) to Gift - Allocation.

4. Use template blocks to search for Allocation. Some hints follow.

Lookups — Actions

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

[View Criteria] [Clear]   [Search]

Allocation Lookup (70040) — Help

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

A. This will be the assigned Allocation ID. In Blackbaud this would be called a Project ID. In BASIS it will be an Account.
   a. This number will start with one of the following two digit numbers and will be 8 digits long:
      i. 30
      ii. 31

      iii. 40
      iv. 50
      v. 70
      vi. 90

B. Use the ISIS Item Type number here. This is the ISIS number that's used in UAConnect. It will always start with 901100. HOWEVER! You must not use the 901100 to search, only use the second half of the Item Type.
   a. Ex. ISIS Item Type is 901100511701
   b. Only use 511701 in the search field.
C. Short Name and Long Name can both be used to search for an allocation by its name.
D. Department, Sub Dept, Campus, School and Agency are drop downs that allow you to search for all allocations assigned to a particular area.
   a. Ex. Change the School drop-down to School of Architecture and the report will show all Allocations for the School of Architecture.

ALL OTHER FIELDS ARE ALSO USEABLE. YOU MAY ALSO USE THE FIELDS IN CONJUNCTION TO NARROW THE SEARCH.

SEE **NEXT PAGE** FOR AN EXAMPLE OF THE SEARCH FIELDS ON A REAL ALLOCATION.

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Epley Razorback Marching Band Scholarship the Detail Screen.

5. Enter your search string in either the Email Address field. Below we search for Jamie

   Dixon. Use any other search blocks necessary to limit your results.

Note: Because this is set to Equal, your search stream must be perfect. You can change this setting to Contains if you only know part of the eMail address.

6. Click Search. Search

7. Review search results.